

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

1-01

☐ Other ☐ Amendment Number:

Contract Number

EP-C-11-046

Contract Period 09/19/2011 To 08/31/2013

Base

Option Period Number 1

Title of Work Assignment/SF Site Name

MOVES International 2

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

Section 2 Data management subsection pg 5 of sow

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 09/11/2012 To 08/31/2013

Comments:



Superfund

Accounting and Appropriations Data



Non-Superfund

SFO
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

09/19/2011 To 08/31/2013

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor W/P Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Ed Glover

Branch/Mail Code:

Phone Number 734-214-4406

FAX Number:

(Signature)

(Date)

Project Officer Name Joie Middlebrook

Branch/Mail Code:

Phone Number: 734-214-4934

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Angela Lower

Branch/Mail Code:

Phone Number: 513-487-2036

FAX Number:

(Signature)

(Date)

Performance Work Statement

Title: "Continuation of the Development of the Initial MOVES International Model Framework"

Contract / Work Assignment EP-C-11-046 1-01

Period of Performance 09/16/12/-08/31/13

Issuing Office US-Environmental Protection Agency
2000 Traverwood Drive
Ann Arbor, MI 48105-2498

Contractor Eastern Research Group

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Contract Officer (CO) Angela Lower, CPOD
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Background

EPA has developed a comprehensive vehicle emission model software program called MOVES. It is used to estimate emission inventories and emission rates from on-road motor vehicles in all U.S. states and territories. There is a need to modify / extend the MOVES model capability so that it can be used to model vehicle emissions inventories and rates in other counties. The Office of Air and Radiation (OAR) International program office is interested in a model with such capability.

Considerable work on this project has already occurred under Contract EP-C-11-046 Work Assignment 0-04. This new Work Assignment is a continuation of the existing work.

Goals

The overall goal of this Work Assignment is to create a generalized process for modifying the United States based MOVES model so that it can be used for a variety of local conditions in an international setting. It is a continuation of the work under Contract EP-C-11-046 Work Assignment 0-04. No new sub-tasks are requested.

Technical Description of Work to be Performed**1. Contractor Work Plan Development**

The Contractor shall develop a Work Plan which describes in detail how they plan to accomplish the major sub-tasks and meet the overall goal.

2. MOVES Coding Changes

The Contractor shall carefully review the model code and determine all the areas where coding changes are required in-order to generalize the model for international use. All areas of the model which contain such code shall be located and identified in the Contractor's WorkPlan. However, due to relatively limited funding, only areas of the code which would definitely prevent the generalization of the international model and have significant impacts on the results shall be considered for modification.

Implementation of MOVES international model will be done by selecting the MOVES "Custom Domain" option and entering in the specific local data. Currently, this option allows the user to model a group of US counties in a general fashion. It will be extended to allow the user to model a set of 'states' in a foreign country or the entire foreign country as one entity. The Contractor shall verify that this extension of capability is possible, and what, if any, coding changes are required to achieve it.

Also, if generalization of the model requires the modification of a MOVES table structure, then code changes will automatically be required. One primary object of this sub-task is to anticipate most code and MOVES database table structural changes up-front in this task so that these types of changes are not required or are absolutely minimal when a user wants to model a specific locality. Finally, since this is a limited and initial project to create a MOVES international model framework, the coding changes should be confined to those areas which are absolutely essential to the project, and they should be designed so that they can be turned on and off within the model code. All code changes shall be modular so that EPA can easily incorporate

them into the default 'working' version of MOVES. EPA does not want the MOVES international version to become an 'orphan' piece of code over time.

3. MOVES Database Changes

The MOVES model is primarily a data driven model, and uses a default MySQL database extensively in its calculations. Thus, the major task of this Work Assignment is to identify the list of tables which need to be either changed in terms of structure or modified in terms of content in-order to internationalize the MOVES model. The Contractor shall also develop a detailed plan of how to make such changes and write software (i.e., MySQL database scripts) to accomplish it in a general way. For example, MOVES contains considerable default data on emission rates, fuel effects, vehicle speed-time cycles and vehicle population, VMT fractions and other distributions that most likely will need to be modified with local data in order to get accurate results.

a. Custom Domain Plan

MOVES currently contains an input option call the "Custom Domain" which allows the user to specify a custom geographic domain (i.e., a set of US counties) and provide most of the local data required to model it. EPA feels that this "Custom Domain" can be extended to allow the modeling of a foreign country or a group of states within a foreign country. Users would supply local activity, fleet distribution, and fuel parameters through the Custom Domain Manager; if these data are available this could be done relatively quickly. However, the resulting model would be based on default U.S. emission rates reflecting U.S. standards, and the driving patterns, vehicles classes and road types already in MOVES2010. The Contractor shall provide detailed guidance on how to create and use these inputs for a specific example. The Contractor shall document all data sources, problems and limitations associated with their plan.

b. Emission Rate Converter

The next large area of effort that the Contractor shall perform is to develop a plan, and a software tool which allows the user to transform the current US emission factors into local emission factors. This tool shall allow the user to enter standards type (i.e., Euro2) and phase-in, and output alternative emission rates in a MOVES database format. Alternate emission rate data tables could be developed to reflect different emission standards (Euro, Asia etc.) and implementation dates. This table could likely be developed from the default U.S. emission rates, by mapping Euro or Asia vehicle technologies or standards to their U.S. counterparts; or, an area that had a body of local emission data could develop all new rates. In combination with the Custom Domain inputs the resulting model would be highly customized but would still reflect the driving patterns, vehicles classes and road types already in MOVES2010b. EPA recommends that the software associated with this sub-task be written as a MySQL script which takes / contains input data and puts it into the required MOVES tables.

4. Testing the New MOVES International Model Framework

The purpose of this sub-task is test the new MOVES International Model Framework. The Contractor shall select a particular locality/country they wish to model in a pilot / initial type program. The Contractor shall enter specific local data into the MOVES International Model Framework. This shall include at minimum (1) local data in the Custom Domain importers, and (2) local emission rates transformed from US rates. The goal of the test is to evaluate the ease of use of the new Framework and demonstrate the use of the emission rate converter.

5. Post-testing Evaluation and Documentation

The Contractor shall describe all testing work which was done. The Contractor shall document all code and database changes which were made. The Contractor shall document, in detail, all processes which they develop to transform US specific data into local specific data. The Contractor shall suggest areas of potential future upgrades. The Contractor shall also present a brief review of any problems and limitations encountered during the process. The Contractor shall evaluate the results of the test and present ALL their findings in a final report.

The Contractor shall provide all the code, plans, databases, database scripts, raw data and documentation which were created during this task to the EPA.

6. Deliverables

- a. A very brief Work Plan which lays out in detail a clear plan for the remainder of the work needed to create the MOVES International Framework model and a clear schedule for all deliverables. The Work Plan shall also contain a quality assurance project plan (QAPP).
- b. Identification of any programming or technical issues relating to the successful completion of this task.
- c. Brief written progress reports shall be sent to the WAM and PO every two weeks. It is expected that a phone meetings lasting up to two hours will be required on a monthly basis. These phone meetings shall also be documented and delivered to the WAM and PO.
- d. On a monthly basis (or other convenient point when major features of the coding are complete in draft form), the Contractor shall supply all of the source code to the Work Assignment Manager for testing and review. This includes all intermediate work products and scripts developed by the Contractor. These materials shall be accompanied by (1) a brief progress report that describes the progress of the code development, (2) instructions on how to interpret, install and run the new code, and (4) all written technical explanations of the code, database

and plan. When this deliverable (number 'd') and deliverable 'c' coincide, the written portion of deliverable 'c' may be omitted.

7. Final Deliverable Package SHALL consist of:
 - a. A fully documented and bug free Java, MySQL source, object and executable code which implements the initial MOVES International Framework.
 - b. The modified MOVES database which implements the MOVES International Framework.
 - c. All intermediate and final spreadsheets and work products associated with international emission standards and customizing them for the MOVES model.
 - d. All custom domain inputs, references for such inputs and the associated MOVES input databases.
 - e. All database scripts and other products used for loading new data into the MOVES model.
 - f. Full references for all sources of data used in the model.
 - g. A draft report which describes the analysis process, the programming process, the limitations of the analysis and the final product and the use of the final product. The section, which describes the use of the product, should only address areas which are different than the default MOVES User Guide. This draft report will be approved by the Work Assignment Manager before a final report is released.
 - h. A final report which describes the analysis process, the programming process, the limitations of the analysis and the final product and the use of the final product. The section which describes the use of the product should only address areas which are different than the default MOVES User Guide.
 - i. A full description of the exact initial MOVES code and database which the Contractor started with and all of the code modifications which were done.

8. Schedule

The Contractor shall provide a Work Plan of project tasks and estimated costs by October 5, 2012, or within two weeks of receipt of this Work Assignment. The planned schedule is shown below. If the work assignment start is delayed, the contractor may propose an alternative schedule subject to approval by the work assignment manager.

Completion of contractor Work Plan	Per
Completion of remaining technical analysis	October 26, 2012
Completion of remaining Java/SAS/MySQL coding	November 2, 2012
Completion of draft report and model documentation	November 16, 2012
Completion of final report	November 30, 2012

Performance Work Statement
Title: SmartWay Transport Partnership Support

Contractor: ERG	Contract No.: EP-C-11-046
Work Assignment Number:	1-02, Option 1
Estimated Level of Effort:	
Period of Performance:	Sept 1, 2012 – Aug 31, 2013
Work Assignment Manager (WAM):	Patrice Thornton 2000 Traverwood Drive Ann Arbor, MI 48105 Phone: 734/214-4329 Email: Thornton.patrice@epa.gov
Alternate WAM	Mary Walsh Phone: 734-214-4205 Walsh.mary@epa.gov
Project Officer (PO):	Joie Middlebrook 2000 Traverwood Drive Ann Arbor, MI 48105 Phone: 734-214-4934 Email: middlebrook.joie@epa.gov
Contracting Officer (CO):	Angela Lower Phone: 513-487-2036 Email: lower.angela@epa.gov

Background and Purpose:

SmartWay

The SmartWay Transport Partnership is a joint government - industry partnership aimed at reducing emissions and improving fuel efficiency in the freight industry. Companies that reduce their emissions can qualify to use the EPA SmartWay logo, a mark of clean transportation. The program is designed to provide market incentives for companies, both freight carriers and shippers, and the companies that employ them to reduce emissions and fuel usage. Partners are looking throughout their transportation supply chain and are interested in knowing more about their global transportation footprint and ways to reduce it. EPA is working to reduce air pollution by educating industry and the general public about the link between their behaviors, company and institutional policies, and air quality.

The purpose of this PWS is to encourage more companies to join the SmartWay Partnership and retain existing Partners. Therefore, increasing the visibility of SmartWay and its messages is an important goal. Under this work assignment, the Contractor shall develop effective marketing

messages and produce highly effective communication materials, based on market and industry research, that will recruit and retain more Partners to the SmartWay program.. Contractor shall also assist with conference and event planning and other activities in support of these market-based efforts.

Tasks and Deliverables:

Contractor shall provide all deliverables electronically, initially in draft form as detailed in the Tasks below. All materials must be in line with OPA guidelines and all web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines. The WAM will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the WAM's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

Contractor shall prepare a workplan for the work assignment as specified in the contract. The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WAM, the PO and the CO will review the workplan. However, only the CO can approve/disapprove, suggest revisions, or change the workplan. Official revisions will be given to the Contractor by the Contracting Officer. The Contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

Task 1 Deliverables	Date
Work plan	2 weeks after issuance of WA

Task 2- Development of Marketing Strategy Supporting Recruiting and Retention Plan

Concurrent with information taken from retention strategy already developed, the Contractor shall develop and recommend a marketing strategy for the SmartWay Program. The purpose of this marketing strategy is to continue building SmartWay brand identity, SmartWay brand loyalty and understanding of the SmartWay Transport Partnership to support Partner recruiting and retention efforts, especially for high-value target audiences. EPA is interested in being presented with two options beyond core strategy recommendations that can be adopted when opportunities arise.

The marketing strategy should provide several recommendations for reaching each of the key audiences (partners and third party recruiters) from low-cost to higher cost options. Information on the key audiences will be obtained from work performed under WA0-06, sub task 2. Once EPA decides upon a comprehensive approach, the Contractor shall assist EPA in implementing the marketing strategy for SmartWay.

Contractor shall develop a marketing strategy that will define most appropriate messages for the various freight carrier, logistics, shipper and third- party recruiting audiences identified based on their target commodity group, as well as the best communication channels for reaching these audiences. Commodity groups include retail, food/beverage, manufacturing, pharmaceutical. The messages should be tailored to the specific industry, describe the partnership, explain business and environmental benefits and should target company decision-makers. Messages shall also focus on issues related to the economy, energy security, and high cost of fuel. EPA has undertaken initial research about decision-makers, and the Contractor shall not undertake additional research without consultation and written approval of the WAM.

The marketing strategy should also recommend the most appropriate form for presenting the messages (e.g. advertising for print, radio, and/or television or other non-traditional communication approach such as social media), as well as the products that will need to be produced to accomplish these efforts.

Task 2 Deliverables	Date
First draft of marketing strategy	2 weeks after approval of work plan
Final marketing strategy	1 week after receipt of comments from EPA WAM

Task 3 - Development of Outreach Materials Supporting Recruiting and Retention Plan

Contractor shall incorporate EPA approved messages into existing materials and make recommendations for additional materials that should be developed to support these messages. Contractor shall develop marketing materials that support partner recruitment and retention efforts. Materials supporting retention efforts shall also support partner management improvements. Such materials include, but are not limited to: FAQ documents, standard operating procedures targeted toward different partner types, annual reports, sample news stories, trade journal articles, etc. It is anticipated that 5 requests of material development will occur during the POP. All materials must be formatted for printing through the Government Printing Office (GPO) and must be in line with the Office of Public Affairs standards. All web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines.

Task 3 Deliverables	Date
Recommendations for materials based upon results of research provided by EPA	Four weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Shipper Recruiting tool kit that would include business case, examples of how other shippers are benefiting from SmartWay	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
SOPs for partners	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences

Task 4 – Conference Logistics Support

As directed by the EPA WAM through written technical direction, the Contractor shall make arrangements for displays and presentations at conferences. Meetings may take the form of annual partner meetings, press events, training workshops, regional and annual recognition events, etc. EPA anticipates two conferences during the Period of Performance (POP) for which work may be incurred.- In many cases, local or regional entities will be playing an important role in these events, and Contractor shall provide support to them as appropriate. Specific activities include but are not limited to:

- Handle preparations for conferences, including, but not limited to such tasks as arranging for tables, chairs, electricity, etc., for a booth or other display, and for professional photographer services as needed. Coordination support for conference sessions, such as inviting/notifying speakers named by EPA, reserving session rooms, audio-visual equipment, etc.
- Perform Enforcement screenings on approximately 40 partners will be needed if event is a recognition event.

Task 4 Conferences	Dates
ATA Conference - Las Vegas, NV	10/7/12 – 10/9/12
RILA Sustainability Conference– Phoenix, AZ	9/19/12 – 9/21/12

Task 5 - Coordinate and leverage media relations:

Contractor shall develop a media relations plan that will include ways to assure continuous national, local, and trade press coverage of the SmartWay Transport Partnership efforts.

Plan shall include activities such as pro bono media pitching to three to four national business publications, setting up three to four editorial board meetings, and identifying relevant journalism/media conferences and annual meetings, etc.

Task 5 Deliverables	Dates
Development of media relations plan	4 weeks after receipt of approval of work plan
Creation of formal media pitch package	2 weeks after completion of proceeding step
Media outreach to 3 to 4 business publications	2 weeks after completion of proceeding step
Schedule of editorial board meetings	2 weeks after completion of proceeding step

Task 6 - SmartWay Public Service Announcement Development, Production, Distribution and Tracking

SmartWay has an existing advertising campaign targeted toward the freight industry entitled “Product on Wheels”. In order to ensure that the campaign messaging is relevant to the target audience, the messages need to be refreshed and updated to reflect a global transportation supply

chain focus. Messages need to convey the benefits of SmartWay to businesses. Energy security, and the economy shall be themes throughout the messaging. Contractor shall undertake the following:

- PSA creative production
- Media kits and packaging
- Media outreach
- General maintenance of campaign materials

Task 6 Deliverables	Dates
Draft design of Shipper Ad reflecting a global transportation supply chain focus. Contractor shall create new text and new graphic, using the Campaign on Wheels design.	4 weeks after completion of Task 3
Final design of Shipper Ad	1 week after receipt of comments by EPA WAM
Media Outreach with at least four industry trade publications for PSA placement	4 weeks after completion of previous step

EPA United States Environmental Protection Agency Washington, DC 20460						Work Assignment Number 1-02						
Work Assignment						<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001						
Contract Number EP-C-11-046			Contract Period 09/19/2011 To 08/31/2013			Title of Work Assignment/SF Site Name						
			Base Option Period Number 1									
Contractor EASTERN RESEARCH GROUP, INC.					Specify Section and paragraph of Contract SOW							
Purpose:										Period of Performance		
<input type="checkbox"/> Work Assignment					<input type="checkbox"/> Work Assignment Close-Out							
<input checked="" type="checkbox"/> Work Assignment Amendment					<input type="checkbox"/> Incremental Funding							
<input type="checkbox"/> Work Plan Approval										From 09/01/2012 To 08/31/2013		
Comments:												
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund												
SFO Note: To report additional accounting and appropriations date use EPA Form 1900-69A. (Max 2) <input type="checkbox"/>												
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2												
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Authorized Work Assignment Ceiling												
Contract Period: Cost/Fee: LOE: 09/19/2011 To 08/31/2013												
This Action:												
Total:												
Work Plan / Cost Estimate Approvals												
Contractor WP Dated: Cost/Fee: LOE:												
Cumulative Approved: Cost/Fee: LOE:												
Work Assignment Manager Name Patrice Thornton							Branch/Mail Code:					
							Phone Number 734-214-4329					
(Signature) (Date)							FAX Number:					
Project Officer Name Joie Middlebrook							Branch/Mail Code:					
							Phone Number: 734-214-4934					
(Signature) (Date)							FAX Number:					
Other Agency Official Name							Branch/Mail Code:					
							Phone Number:					
(Signature) (Date)							FAX Number:					
Contracting Official Name Angela Lower							Branch/Mail Code:					
							Phone Number: 513-487-2036					
(Signature) (Date)							FAX Number:					

**Performance Work Statement
Title: SmartWay Transport Partnership Support**

Contractor: ERG

Contract No.: EP-C-11-046

Work Assignment Number:

1-02, Amendment 1

Estimated Level of Effort:

Period of Performance:

Sept 1, 2012 – Aug 31, 2013

Work Assignment Manager (WAM):

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Email: middlebrook.joie@epa.gov

Contracting Officer (CO):

Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

The purpose of the amendment: Is to add additional support and deliverables under Task 3 and 6 as described below in red font. All deliverables the contractor submits shall be inline with the EPA Office of Public Affairs standards and procedures.

Background and Purpose:

SmartWay

The SmartWay Transport Partnership is a joint government - industry partnership aimed at reducing emissions and improving fuel efficiency in the freight industry. Companies that reduce their emissions can qualify to use the EPA SmartWay logo, a mark of clean transportation. The program is designed to provide market incentives for companies, both freight carriers and shippers, and the companies that employ them to reduce emissions and fuel usage. Partners are looking throughout their transportation supply chain and are interested in knowing more about their global transportation footprint and ways to reduce it. EPA is working to reduce air pollution by educating industry and the general public about the link between their behaviors, company and institutional policies, and air quality.

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Tasks and Deliverables:

Contractor shall provide all deliverables electronically, initially in draft form as detailed in the Tasks below. All materials must be in line with OPA guidelines and all web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines. The WAM will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the WAM's comments. Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

Contractor shall prepare a workplan for the work assignment as specified in the contract. The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WAM, the PO and the CO will review the workplan. However, only the CO can approve/disapprove, suggest revisions, or change the workplan. Official revisions will be given to the Contractor by the Contracting Officer. The Contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

Task 1 Deliverables	Date
Work plan	2 weeks after issuance of WA amendment

Task 2- Development of Marketing Strategy Supporting Recruiting and Retention Plan

Concurrent with information taken from retention strategy already developed, the Contractor shall develop and recommend a marketing strategy for the SmartWay Program. The purpose of this marketing strategy is to continue building SmartWay brand identity, SmartWay brand loyalty and understanding of the SmartWay Transport Partnership to support Partner recruiting and retention efforts, especially for high-value target audiences. EPA is interested in being presented with two options beyond core strategy recommendations that can be adopted when opportunities arise.

The marketing strategy should provide several recommendations for reaching each of the key audiences (partners and third party recruiters) from low-cost to higher cost options. Once EPA decides upon a comprehensive approach, the Contractor shall assist EPA in implementing the

marketing strategy for SmartWay.

Contractor shall develop a marketing strategy that will define most appropriate messages for the various freight carrier, logistics, shipper and third- party recruiting audiences identified based on their target commodity group, as well as the best communication channels for reaching these audiences. Commodity groups include retail, food/beverage, manufacturing, pharmaceutical. The messages should be tailored to the specific industry, describe the partnership, explain business and environmental benefits and should target company decision-makers. Messages shall also focus on issues related to the economy, energy security, and high cost of fuel. EPA has undertaken initial research about decision-makers, and the Contractor shall not undertake additional research without consultation and written approval of the WAM.

The marketing strategy should also recommend the most appropriate form for presenting the messages (e.g. advertising for print, radio, and/or television or other non-traditional communication approach such as social media), as well as the products that will need to be produced to accomplish these efforts.

Task 2 Deliverables	Date
First draft of marketing strategy	2 weeks after approval of work plan
Final marketing strategy	1 week after receipt of comments from EPA WAM

Task 3 - Development of Outreach Materials Supporting Recruiting and Retention Plan

Contractor shall incorporate EPA approved messages into existing materials and make recommendations for additional materials that should be developed to support these messages. Contractor shall develop marketing materials that support partner recruitment and retention efforts. Materials supporting retention efforts shall also support partner management improvements. Such materials include, but are not limited to: FAQ documents, standard operating procedures targeted toward different partner types, annual reports, sample news stories, trade journal articles, etc. The Contractor shall design an exhibit panel that incorporates the new SmartWay Transport 2nd generation messages, integrate the SmartWay Transport graphic template, and coordinate with the revised SmartWay Transport PSA campaign. The exhibit panel messages should be designed to communicate with the following key SmartWay Transport audiences: Shippers, Carriers (truck/rail) and Logistics.

It is anticipated that 5 requests of material development will occur during the POP. All materials must be formatted for printing through the Government Printing Office (GPO) and must be in line with the Office of Public Affairs standards. All web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines.

Task 3 Deliverables	Date
Recommendations for materials based upon results of research provided by EPA	Four weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Shipper Recruiting tool kit that would include business case, examples of how other shippers	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each

are benefiting from SmartWay	of the identified target audiences
SOPs for partners/Best Practices	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Draft graphic design and messaging for booth panel	Feb 2013
Final design of booth panel	March 2013

Task 4 – Conference Logistics Support

As directed by the EPA WAM through written technical direction, the Contractor shall make arrangements for displays and presentations at conferences. Meetings may take the form of annual partner meetings, press events, training workshops, regional and annual recognition events, etc. EPA anticipates two conferences during the Period of Performance (POP) for which work may be incurred.- In many cases, local or regional entities will be playing an important role in these events, and Contractor shall provide support to them as appropriate. Specific activities include but are not limited to:

- Handle preparations for conferences, including, but not limited to such tasks as arranging for tables, chairs, electricity, etc., for a booth or other display, and for professional photographer services as needed. Coordination support for conference sessions, such as inviting/notifying speakers named by EPA, reserving session rooms, audio-visual equipment, etc.
- Perform Enforcement screenings on approximately 40 partners will be needed if event is a recognition event.

Task 4 Conferences	Dates
2013 conferences to be determined	

Task 5 - Coordinate and leverage media relations:

Contractor shall develop a media relations plan that will include ways to assure continuous national, local, and trade press coverage of the SmartWay Transport Partnership efforts.

Plan shall include activities such as pro bono media pitching to three to four national business publications, setting up three to four editorial board meetings, and identifying relevant journalism/media conferences and annual meetings, etc.

Task 5 Deliverables	Dates
Development of media relations plan	4 weeks after receipt of approval of work plan
Creation of formal media pitch package	2 weeks after completion of proceeding step
Media outreach to 3 to 4 business publications	2 weeks after completion of proceeding step

Schedule of editorial board meetings	2 weeks after completion of proceeding step
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Task 6 - SmartWay Public Service Announcement Development, Production, Distribution and Tracking

SmartWay has an existing advertising campaign targeted toward the freight industry entitled "Product on Wheels". In order to ensure that the campaign messaging is relevant to the target audience, the messages need to be refreshed and updated to reflect a global transportation supply chain focus. Messages need to convey the benefits of SmartWay to businesses. Energy security, and the economy shall be themes throughout the messaging. In addition to a refreshed ad, Contractor shall pursue the development of two new concepts that depart from the Product on Wheels look and feel. One ad shall be targeted toward the Shipper and one targeted toward the Carrier. Contractor shall undertake the following:

- PSA creative production
- Media kits and packaging
- Media outreach for pro bono placement
- Media outreach to obtain paid placement
- General maintenance of campaign materials

Task 6 Deliverables	Dates
Draft design of Shipper Ad reflecting a global transportation supply chain focus. Contractor shall create new text and new graphic, using the Campaign on Wheels design.	4 weeks after completion of Task 3
Final design of Shipper Ad	1 week after receipt of comments by EPA WAM
Media Outreach with at least four industry trade publications for PSA placement	4 weeks after completion of previous step
New 2 nd generation messaging	Nov 2012
Draft ad concepts that depart from Product on Wheels design	Nov 2012
Final two ads	December 2012
Media Outreach with several industry trade publications for paid PSA placement	Jan 2013

REPORTING AND OTHER REQUIREMENTS

The Contractor shall prepare its Work Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official

revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

United States Environmental Protection Agency Washington, DC 20460		Work Assignment Number 0-0 1 - 02	
Work Assignment] Original xx Amendment Number: 2	
Contract Number EPC-11-046	Contract Period 9/1/12 – 8/31/13	Option Period Number Opt Period 1	Title of Work Assignment SmartWay Transport Partnership Support
Contractor ERG		Specify Section and Paragraph of Contract SOW Sect 1, 1a. and 1b.	
Purpose: <input type="checkbox"/> Work Assignment Initiation <input type="checkbox"/> Work Assignment Close-Out [X] Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Periods of Performance From: Effective Date To: August 31, 2013	
Comments:			
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund			
Li	DC (Max 6)	Bu dg et/	Approp riation Code
		Budget Org/Code (Max 7)	Program Element (Max 9)
		Object Class (Max 4)	Am oun t
		(D oll ars	(Cents)
		Site/Project (Max 8)	Cost Org/Code (Max 7)
1			
2			
3			
4			
5			
Authorized Work Assignment Ceiling			
Contract Period:		Cost/Fee	LOE
This Action			
Total			
Work Plan / Cost Estimate Approvals			
Contractor WP Dated :		Cost/Fee:54,000	LOE: 440
Cumulative Approved:		Cost/Fee:54,000	LOE: 440
Work Assignment Manager Name: Patrice Thornton <i>Patrice Thornton</i> 5/29/13		Branch/Mail Code	
		Phone Number 734-214-4329	
		Fax Number 734/214-4052	
Project Officer Name M. T. Middlebrook <i>M. T. Middlebrook</i> 5/29/13		Branch/Mail Code TRPD	
		Phone Number 734-214-4934	
		Fax Number 734-214-4906	
Other Agency Official Name _____ (Signature)		Branch/Mail Code	
		Phone Number 734/214-	
		Fax Number 734/214-	
Contracting Official Name Angela Lower _____ (Signature)		Branch/Mail Code CMD	
		Phone Number 513-487-2036	
		Fax Number 513-487-2107	
Contractor Acknowledgement of Receipt and Approval of Workplan (Signature and Title)			Date

Performance Work Statement
Title: SmartWay Transport Partnership Support

Contractor: ERG

Contract No.: EP-C-11-046

Work Assignment Number:

1-02, Amendment 2

Estimated Level of Effort:

Period of Performance:

Sept 1, 2012 – Aug 31, 2013

Work Assignment Manager (WAM):

Patrice Thornton
2000 Traverwood Drive
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Phone: 734/214-4329
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Alternate WAM

Mary Walsh
Phone: 734-214-4205
Walsh.mary@epa.gov

Project Officer (PO):

Joie Middlebrook
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Phone: 734-214-4934
Email: middlebrook.joie@epa.gov

Contracting Officer (CO):

Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

The purpose of amendment 2 is to add additional scope to Task 3, and specify upcoming conferences in Task 4

Background and Purpose:

SmartWay

The SmartWay Transport Partnership is a joint government - industry partnership aimed at reducing emissions and improving fuel efficiency in the freight industry. Companies that reduce their emissions can qualify to use the EPA SmartWay logo, a mark of clean transportation. The program is designed to provide market incentives for companies, both freight carriers and shippers, and the companies that employ them to reduce emissions and fuel usage. Partners are looking throughout their transportation supply chain and are interested in knowing more about their global transportation footprint and ways to reduce it. EPA is working to reduce air pollution by educating industry and the general public about the link between their behaviors, company and institutional policies, and air quality.

The purpose of this PWS is to encourage more companies to join the SmartWay Partnership and retain existing Partners. Therefore, increasing the visibility of SmartWay and its messages is an important goal. Under this work assignment, the Contractor shall develop effective marketing messages and produce highly effective communication materials, based on market and industry research, that will recruit and retain more Partners to the SmartWay program.. Contractor shall also assist with conference and event planning and other activities in support of these market-based efforts.

Tasks and Deliverables:

Contractor shall provide all deliverables electronically, initially in draft form as detailed in the Tasks below. All materials must be in line with OPA guidelines and all web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines. The WAM will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the WAM's comments. Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

Contractor shall prepare a workplan for the work assignment as specified in the contract. The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WAM, the PO and the CO will review the workplan. However, only the CO can approve/disapprove, suggest revisions, or change the workplan. Official revisions will be given to the Contractor by the Contracting Officer. The Contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

Task 1 Deliverables	Date
Work plan	2 weeks after issuance of WA amendment

Task 2- Development of Marketing Strategy Supporting Recruiting and Retention Plan

Concurrent with information taken from retention strategy already developed, the Contractor shall develop and recommend a marketing strategy for the SmartWay Program. The purpose of this marketing strategy is to continue building SmartWay brand identity, SmartWay brand loyalty and understanding of the SmartWay Transport Partnership to support Partner recruiting and retention efforts, especially for high-value target audiences. EPA is interested in being presented with two options beyond core strategy recommendations that can be adopted when opportunities arise.

The marketing strategy should provide several recommendations for reaching each of the key audiences (partners and third party recruiters) from low-cost to higher cost options. Once EPA

decides upon a comprehensive approach, the Contractor shall assist EPA in implementing the marketing strategy for SmartWay.

Contractor shall develop a marketing strategy that will define most appropriate messages for the various freight carrier, logistics, shipper and third- party recruiting audiences identified based on their target commodity group, as well as the best communication channels for reaching these audiences. Commodity groups include retail, food/beverage, manufacturing, pharmaceutical. The messages should be tailored to the specific industry, describe the partnership, explain business and environmental benefits and should target company decision-makers. Messages shall also focus on issues related to the economy, energy security, and high cost of fuel. EPA has undertaken initial research about decision-makers, and the Contractor shall not undertake additional research without consultation and written approval of the WAM.

The marketing strategy should also recommend the most appropriate form for presenting the messages (e.g. advertising for print, radio, and/or television or other non-traditional communication approach such as social media), as well as the products that will need to be produced to accomplish these efforts.

Task 2 Deliverables	Date
First draft of marketing strategy	2 weeks after approval of work plan
Final marketing strategy	1 week after receipt of comments from EPA WAM

Task 3 - Development of Outreach Materials Supporting Recruiting and Retention Plan

Contractor shall incorporate EPA approved messages into existing materials and make recommendations for additional materials that should be developed to support these messages. Contractor shall develop marketing materials that support partner recruitment and retention efforts. Materials supporting retention efforts shall also support partner management improvements. Such materials include, but are not limited to: FAQ documents, standard operating procedures targeted toward different partner types, annual reports, sample news stories, trade journal articles, etc. The Contractor shall design an exhibit panel that incorporates the new SmartWay Transport 2nd generation messages, integrate the SmartWay Transport graphic template, and coordinate with the revised SmartWay Transport PSA campaign. The exhibit panel messages should be designed to communicate with the following key SmartWay Transport audiences: Shippers, Carriers (truck/rail) and Logistics. A second panel of the same size shall be designed and reproduced. Additional panel will also feature the new look and feel of the program and shall complement the first panel.

It is anticipated that 5 requests of material development will occur during the POP. All materials must be formatted for printing through the Government Printing Office (GPO) and must be in line with the Office of Public Affairs standards. All web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines.

Retention efforts will also celebrate and highlight achievements and results of the partnership over the last 10 years. In addition, current partners need to know and understand that there is a vision for the SmartWay program. To this end, Contractor shall assist with planning a series of

activities that will bring attention to the 10th anniversary of SmartWay. Activities will include development of short testimonials by partners, collection of pictures from partners and affiliates featuring the SmartWay logo, development of web banners for partners to use on their websites. As a way to bring attention to the future vision of SmartWay, Contractor shall assist in the creative development of a vision document which will highlight accomplishments of the program as well as next steps for the program. It is anticipated that 4 requests of material development will occur as part of amendment 2.

Task 3 Deliverables	Date
Recommendations for materials based upon results of research provided by EPA	Four weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Shipper Recruiting tool kit that would include business case, examples of how other shippers are benefiting from SmartWay	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
SOPs for partners/Best Practices	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Draft graphic design and messaging for booth panel	Feb 2013
Final design of booth panel	March 2013
Draft design and messaging for 2 nd Booth panel	June 2013
Final design and messaging for 2 nd Booth panel	July 2013
Draft of 20/20 vision report	August 2013
Final of 20/20 vision report	
Strategy for increasing visibility of SmartWay while celebrating 10 years of SmartWay	August 2013

Task 4 – Conference Logistics Support

As directed by the EPA WAM through written technical direction, the Contractor shall make arrangements for displays and presentations at conferences. Meetings may take the form of annual partner meetings, press events, training workshops, regional and annual recognition events, etc. EPA anticipates two conferences during the Period of Performance (POP) for which work may be incurred.- In many cases, local or regional entities will be playing an important role in these events, and Contractor shall provide support to them as appropriate. Specific activities

include but are not limited to:

- Handle preparations for conferences, including, but not limited to such tasks as arranging for tables, chairs, electricity, etc., for a booth or other display, and for professional photographer services as needed. Coordination support for conference sessions, such as inviting/notifying speakers named by EPA, reserving session rooms, audio-visual equipment, etc.
- Perform Enforcement screenings on approximately 40 partners will be needed if event is a recognition event.

Task 4 Conferences	Dates
Grocery Managers Association	August 2013
Council of Supply Chain Management Professionals	Oct 2013
RILA	Oct 2013
NITLeague	Nov 2013

Task 5 - Coordinate and leverage media relations:

Contractor shall develop a media relations plan that will include ways to assure continuous national, local, and trade press coverage of the SmartWay Transport Partnership efforts.

Plan shall include activities such as pro bono media pitching to three to four national business publications, setting up three to four editorial board meetings, and identifying relevant journalism/media conferences and annual meetings, etc.

Task 5 Deliverables	Dates
Development of media relations plan	4 weeks after receipt of approval of work plan
Creation of formal media pitch package	2 weeks after completion of proceeding step
Media outreach to 3 to 4 business publications	2 weeks after completion of proceeding step
Schedule of editorial board meetings	2 weeks after completion of proceeding step

Task 6 - SmartWay Public Service Announcement Development, Production, Distribution and Tracking

SmartWay has an existing advertising campaign targeted toward the freight industry entitled "Product on Wheels". In order to ensure that the campaign messaging is relevant to the target audience, the messages need to be refreshed and updated to reflect a global transportation supply chain focus. Messages need to convey the benefits of SmartWay to businesses. Energy security, and the economy shall be themes throughout the messaging. In addition to a refreshed ad, Contractor shall pursue the development of two new concepts that depart from the Product on Wheels look and feel. One ad shall be targeted toward the Shipper and one targeted toward the Carrier. Contractor shall undertake the following:

- PSA creative production
- Media kits and packaging

Media outreach for pro bono placement
 Media outreach to obtain paid placement
 General maintenance of campaign materials

Task 6 Deliverables	Dates
Draft design of Shipper Ad reflecting a global transportation supply chain focus. Contractor shall create new text and new graphic, using the Campaign on Wheels design.	4 weeks after completion of Task 3
Final design of Shipper Ad	1 week after receipt of comments by EPA WAM
New 2 nd generation messaging	Nov 2012
Draft ad concepts that depart from Product on Wheels design	Nov 2012
Final two ads	December 2012
Media Outreach with several industry trade publications for paid PSA placement	Jan 2013

REPORTING AND OTHER REQUIREMENTS

The Contractor shall prepare its Work Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is

written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

1-02

☐ Other ☒ Amendment Number:

000003

Contract Number
EP-C-11-046

Contract Period 09/19/2011 To 08/31/2014

Title of Work Assignment/SF Site Name

Base ☒ Option Period Number

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

Purpose:

☐

Work Assignment

☐

Work Assignment Close-Out

☒

Work Assignment Amendment

☐

Incremental Funding

☐

Work Plan Approval

Period of Performance

From 09/01/2012 To 08/31/2013

Comments:

☐

Superfund

Accounting and Appropriations Data

☒

Non-Superfund

SFO
(Max 2)☐

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:

09/19/2011 To 08/31/2014

Cost/Fee:

LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Patrice Thornton

Branch/Mail Code:

Phone Number 734-214-4329

FAX Number:

(Signature)

(Date)

Project Officer Name Joie Middlebrook

Branch/Mail Code:

Phone Number: 734-214-4934

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Angela Lower

Branch/Mail Code:

Phone Number: 513-487-2036

FAX Number:

(Signature)

(Date)

8/1/13

Performance Work Statement
Title: SmartWay Transport Partnership Support

Contractor: ERG

Contract No.: EP-C-11-046

Work Assignment Number:

1-02, Amendment 3

Estimated Level of Effort:

Period of Performance:

Sept 1, 2012 – Aug 31, 2013

Work Assignment Manager (WAM):

Patrice Thornton
2000 Traverwood Drive
Ann Arbor, MI 48105
Phone: 734/214-4329
Email: Thornton.patrice@epa.gov

Alternate WAM

Mary Walsh
Phone: 734-214-4205
Walsh.mary@epa.gov

Project Officer (PO):

Joie Middlebrook
2000 Traverwood Drive
Ann Arbor, MI 48105
Phone: 734-214-4934
Email: middlebrook.joie@epa.gov

Contracting Officer (CO):

Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

The purpose of amendment 3 is to add additional scope to Task 4.

Background and Purpose:

SmartWay

The SmartWay Transport Partnership is a joint government - industry partnership aimed at reducing emissions and improving fuel efficiency in the freight industry. Companies that reduce their emissions can qualify to use the EPA SmartWay logo, a mark of clean transportation. The program is designed to provide market incentives for companies, both freight carriers and shippers, and the companies that employ them to reduce emissions and fuel usage. Partners are looking throughout their transportation supply chain and are interested in knowing more about their global transportation footprint and ways to reduce it. EPA is working to reduce air pollution by educating industry and the general public about the link between their behaviors, company and institutional policies, and air quality.

The purpose of this PWS is to encourage more companies to join the SmartWay Partnership and retain existing Partners. Therefore, increasing the visibility of SmartWay and its messages is an

important goal. Under this work assignment, the Contractor shall develop effective marketing messages and produce highly effective communication materials, based on market and industry research, that will recruit and retain more Partners to the SmartWay program.. Contractor shall also assist with conference and event planning and other activities in support of these market-based efforts.

Tasks and Deliverables:

Contractor shall provide all deliverables electronically, initially in draft form as detailed in the Tasks below. All materials must be in line with OPA guidelines and all web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines. The WAM will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the WAM's comments. Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Workplan

Contractor shall prepare a workplan for the work assignment as specified in the contract. The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WAM, the PO and the CO will review the workplan. However, only the CO can approve/disapprove, suggest revisions, or change the workplan. Official revisions will be given to the Contractor by the Contracting Officer. The Contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

Task 1 Deliverables	Date
Work plan	2 weeks after issuance of WA amendment

Task 2- Development of Marketing Strategy Supporting Recruiting and Retention Plan

Concurrent with information taken from retention strategy already developed, the Contractor shall develop and recommend a marketing strategy for the SmartWay Program. The purpose of this marketing strategy is to continue building SmartWay brand identity, SmartWay brand loyalty and understanding of the SmartWay Transport Partnership to support Partner recruiting and retention efforts, especially for high-value target audiences. EPA is interested in being presented with two options beyond core strategy recommendations that can be adopted when opportunities arise.

The marketing strategy should provide several recommendations for reaching each of the key audiences (partners and third party recruiters) from low-cost to higher cost options. Once EPA decides upon a comprehensive approach, the Contractor shall assist EPA in implementing the marketing strategy for SmartWay.

Contractor shall develop a marketing strategy that will define most appropriate messages for the various freight carrier, logistics, shipper and third- party recruiting audiences identified based on their target commodity group, as well as the best communication channels for reaching these audiences. Commodity groups include retail, food/beverage, manufacturing, pharmaceutical. The messages should be tailored to the specific industry, describe the partnership, explain business and environmental benefits and should target company decision-makers. Messages shall also focus on issues related to the economy, energy security, and high cost of fuel. EPA has undertaken initial research about decision-makers, and the Contractor shall not undertake additional research without consultation and written approval of the WAM.

The marketing strategy should also recommend the most appropriate form for presenting the messages (e.g. advertising for print, radio, and/or television or other non-traditional communication approach such as social media), as well as the products that will need to be produced to accomplish these efforts.

Task 2 Deliverables	Date
First draft of marketing strategy	2 weeks after approval of work plan
Final marketing strategy	1 week after receipt of comments from EPA WAM

Task 3 - Development of Outreach Materials Supporting Recruiting and Retention Plan

Contractor shall incorporate EPA approved messages into existing materials and make recommendations for additional materials that should be developed to support these messages. Contractor shall develop marketing materials that support partner recruitment and retention efforts. Materials supporting retention efforts shall also support partner management improvements. Such materials include, but are not limited to: FAQ documents, standard operating procedures targeted toward different partner types, annual reports, sample news stories, trade journal articles, etc. The Contractor shall design an exhibit panel that incorporates the new SmartWay Transport 2nd generation messages, integrate the SmartWay Transport graphic template, and coordinate with the revised SmartWay Transport PSA campaign. The exhibit panel messages should be designed to communicate with the following key SmartWay Transport audiences: Shippers, Carriers (truck/rail) and Logistics. A second panel of the same size shall be designed and reproduced. Additional panel will also feature the new look and feel of the program and shall complement the first panel.

It is anticipated that 5 requests of material development will occur during the POP. All materials must be formatted for printing through the Government Printing Office (GPO) and must be in line with the Office of Public Affairs standards. All web content shall comply with section 508 and other Office of Public Affairs (OPA) guidelines.

Retention efforts will also celebrate and highlight achievements and results of the partnership over the last 10 years. In addition, current partners need to know and understand that there is a vision for the SmartWay program. To this end, Contractor shall assist with planning a series of activities that will bring attention to the 10th anniversary of SmartWay. Activities will include development of short testimonials by partners, collection of pictures from partners and affiliates

featuring the SmartWay logo, development of web banners for partners to use on their websites. As a way to bring attention to the future vision of SmartWay, Contractor shall assist in the creative development of a vision document which will highlight accomplishments of the program as well as next steps for the program. It is anticipated that 4 requests of material development will occur as part of amendment 2.

Task 3 Deliverables	Date
Recommendations for materials based upon results of research provided by EPA	Four weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Shipper Recruiting tool kit that would include business case, examples of how other shippers are benefiting from SmartWay	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
SOPs for partners/Best Practices	8 weeks after acceptance by EPA of agreed-upon messages from the previous task, for each of the identified target audiences
Draft graphic design and messaging for booth panel	Feb 2013
Final design of booth panel	March 2013
Draft design and messaging for 2 nd Booth panel	June 2013
Final design and messaging for 2 nd Booth panel	July 2013
Draft of 20/20 vision report	August 2013
Final of 20/20 vision report	
Strategy for increasing visibility of SmartWay while celebrating 10 years of SmartWay	August 2013

Task 4 – Conference Logistics Support

As directed by the EPA WAM through written technical direction, the Contractor shall make arrangements for displays and presentations at conferences. Meetings may take the form of annual partner meetings, press events, training workshops, regional and annual recognition events, etc. EPA anticipates two conferences during the Period of Performance (POP) for which work may be incurred.- In many cases, local or regional entities will be playing an important role in these events, and Contractor shall provide support to them as appropriate. Specific activities include but are not limited to:

- Handle preparations for conferences, including, but not limited to such tasks as arranging for tables, chairs, electricity, etc., for a booth or other display, and for professional

photographer services as needed. Coordination support for conference sessions, such as inviting/notifying speakers named by EPA, reserving session rooms, audio-visual equipment, etc.

- Perform Enforcement screenings on approximately 40 partners will be needed if event is a recognition event.

Task 4 Conferences	Dates
Grocery Managers Association	August 2013
Council of Supply Chain Management Professionals	Oct 2013
RILA	Oct 2013
NITLeague	Nov 2013

Task 4a – Stakeholder Outreach, facilitation and communication support for SmartWay/Ports Summit

Under this sub task, ERG will provide technical, organizational, logistical, audio/visual, meeting facilitation, administrative, and background materials developmental support to EPA for SmartWay ports workshop to be held in late March 2014.

Specific support activities will involve some or all of the following, as directed by the EPA xxx:

- Coordinate, administer and provide follow up activities for 4 webinars. Webinars will be held between Sept of 2013 and Jan of 2014. EPA will provide phone lines. Contractor shall send out invitation (will be created by EPA) to a list of contacts provided by EPA. Manage the RSVP list, troubleshoot any registration issues, facilitate the actual webinar, EPA will arrange for speakers for each webinar. Contractor shall collect speaker bios and as part of the meeting facilitation, introduce the webinar speakers. Contractor shall make sure webinars are recorded and transcribed. Webinar presentation shall be 508 compliant and made ready for the website.

The following tasks pertain to the March summit

- Make arrangements and, if needed, advance payments for March conference space, audio visual support, Internet, telephony, electrical, honoraria and professional photography.
- Provide assistance to EPA with conference agenda development, strategy, and messaging.
- Assist with development and or delivery of participant invitations and follow-up communications.
- Develop and or maintain and host interim SmartWay ports website which will include a summit registration site. Content will be provided by EPA. Look and feel will mirror SmartWay website.
- Assist with development and delivery of speaker/moderator invitations and instructions.
- Collect and coordinate speaker presentations.
- Collect speaker bios for introductions.
- Design, develop and print meeting packets (e.g., folders/binders, participant list, agenda, speaker bios, Ports background materials, and or sponsor materials, as appropriate.)
- Organize, print, and distribute name badges.
- Assist with the development and design of summary SmartWay and ports program materials (e.g., 2-3 page program summary based on existing information provided by the

- program.)
- Assist with the development and design of SmartWay and ports exhibit materials (e.g., informational posters based on existing information provided by the program).
 - Assist with the development and design of meeting signage (i.e., to direct participants to meeting rooms, etc.)
 - Manage on-site registration and distribution of name badges and meeting packets.
 - During the summit, assist with agenda coordination and trouble shooting, (e.g., coordinating and communicating with moderators and speakers, organizing session transitions, managing microphones for Q and A, time-keeping, collecting and preparing Power Points, and or providing backup facilitation/moderation as needed.)
 - Take meeting notes.
 - Run audio/slide recording during the meeting.
 - Coordinate and trouble shoot with the venue and service providers.
 - Assist, as needed with set up of exhibits, meeting signage, etc.
 - Following the meeting, collect and coordinate presentations and other materials for website or other follow up communications.
 - Develop a high level meeting summary focused on key themes.

Task 4a Deliverables	Dates
Access to Go To Meetings for Webinar 1 – 4	August 23, 2013
Hosted site for Interim SmartWay ports webpage	Sept 6, 2013
Webinar 1 presentation 508 compliant and posted on website	Sept 17, 2013

Task 5 - Coordinate and leverage media relations:

Contractor shall develop a media relations plan that will include ways to assure continuous national, local, and trade press coverage of the SmartWay Transport Partnership efforts.

Plan shall include activities such as pro bono media pitching to three to four national business publications, setting up three to four editorial board meetings, and identifying relevant journalism/media conferences and annual meetings, etc.

Task 5 Deliverables	Dates
Development of media relations plan	4 weeks after receipt of approval of work plan
Creation of formal media pitch package	2 weeks after completion of proceeding step
Media outreach to 3 to 4 business publications	2 weeks after completion of proceeding step
Schedule of editorial board meetings	2 weeks after completion of proceeding step

Task 6 - SmartWay Public Service Announcement Development, Production, Distribution and Tracking

SmartWay has an existing advertising campaign targeted toward the freight industry entitled "Product on Wheels". In order to ensure that the campaign messaging is relevant to the target audience, the messages need to be refreshed and updated to reflect a global transportation supply chain focus. Messages need to convey the benefits of SmartWay to businesses. Energy security, and the economy shall be themes throughout the messaging. In addition to a refreshed ad, Contractor shall pursue the development of two new concepts that depart from the Product on Wheels look and feel. One ad shall be targeted toward the Shipper and one targeted toward the Carrier. Contractor shall undertake the following:

- PSA creative production
- Media kits and packaging
- Media outreach for pro bono placement
- Media outreach to obtain paid placement
- General maintenance of campaign materials

Task 6 Deliverables	Dates
Draft design of Shipper Ad reflecting a global transportation supply chain focus. Contractor shall create new text and new graphic, using the Campaign on Wheels design.	4 weeks after completion of Task 3
Final design of Shipper Ad	1 week after receipt of comments by EPA WAM
New 2 nd generation messaging	Nov 2012
Draft ad concepts that depart from Product on Wheels design	Nov 2012
Final two ads	December 2012
Media Outreach with several industry trade publications for paid PSA placement	Jan 2013

REPORTING AND OTHER REQUIREMENTS

The Contractor shall prepare its Work Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the

Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-03	
		<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:	
Contract Number EP-C-11-046	Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1	Title of Work Assignment/SF Site Name MOVES Travel Input Workshop Su	
Contractor EASTERN RESEARCH GROUP, INC.		Specify Section and paragraph of Contract SOW 1D	
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 01/25/2013 To 08/31/2013	
Comments:			
<input type="checkbox"/> Superfund		Accounting and Appropriations Data	
		<input checked="" type="checkbox"/> Non-Superfund	
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.			
SFO (Max 2) <input type="checkbox"/>			
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)
			Budget Org/Code (Max 7)
			Program Element (Max 9)
			Object Class (Max 4)
			Amount (Dollars)
			(Cents)
			Site/Project (Max 8)
			Cost Org/Code (Max 7)
1			
2			
3			
4			
5			
Authorized Work Assignment Ceiling			
Contract Period: 09/19/2011 To 08/31/2013		Cost/Fee: LOE:	
This Action:			
Total:			
Work Plan / Cost Estimate Approvals			
Contractor WP Dated:		Cost/Fee: LOE:	
Cumulative Approved:		Cost/Fee: LOE:	
Work Assignment Manager Name Astrid Larsen		Branch/Mail Code:	
_____		Phone Number 734-214-4812	
(Signature) (Date)		FAX Number:	
Project Officer Name Joie Middlebrook		Branch/Mail Code:	
_____		Phone Number: 734-214-4934	
(Signature) (Date)		FAX Number:	
Other Agency Official Name		Branch/Mail Code:	
_____		Phone Number:	
(Signature) (Date)		FAX Number:	
Contracting Official Name Angela Lower		Branch/Mail Code:	
_____		Phone Number: 513-487-2036	
(Signature) (Date)		FAX Number:	

Performance Work Statement
Title: MOVES Travel Input Workshop Support

Contractor: ERG
Work Assignment Number:
Estimated Level of Effort:
Period of Performance:

Contract No.: EP-C-11-046
1-03
Initiation to August 31, 2013

Work Assignment Manager (WAM):

Astrid Larsen
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Alternate WAM

Patty Klavon
Phone: 734-214-4476
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Project Officer (PO):

Joie Middlebrook
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Ann Arbor, MI 48105
Phone: 734-214-4934
Email: middlebrook.joie@epa.gov

Contracting Officer (CO):

Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

Background and Purpose:

The Motor Vehicle Emission Simulator (MOVES) is U.S. Environmental Protection Agency's (EPA's) state-of-the-art tool for estimating emissions from highway vehicles. The model is based on analyses of millions of emission test results and considerable advances in the Agency's understanding of vehicle emissions. Compared to previous tools, MOVES incorporates the latest emissions data, more sophisticated calculation algorithms, increased user flexibility, new software design, and significant new capabilities. EPA announced the release of MOVES2010 in March 2010 (75 Federal Register 9411), and released minor revisions as MOVES2010a in September 2010 and MOVES2010b in April 2012.

MOVES is EPA's latest motor vehicle emissions model for state and local agencies to estimate volatile organic compounds (VOCs), nitrogen oxides (NOx), particulate matter (PM2.5 and PM10), carbon monoxide, and other precursors from cars, trucks, buses, and motorcycles for State Implementation Plans (SIPs) and transportation conformity determinations outside California. MOVES also calculates greenhouse gases (GHGs) and air toxics.

The purpose of this PWS is to provide support for a MOVES workshop for users to develop fleet and activity inputs for MOVES. The Contractor shall assist with workshop planning, supporting and follow up. For planning purposes, the workshop will be a one and ¾ day program in the Ann Arbor, MI, area. The expected audience is 100- 150 in-person attendees of state and local government officials, consultants, academics, and EPA employees. The workshop will also be broadcast via webinar to another 50 – 100 attendees.

Tasks and Deliverables:

The Contractor shall provide all deliverables electronically, initially in draft form, as detailed in the Tasks below. The Work Assignment Manager (WAM) will review all deliverables in draft form and provide revisions and/or comments to the Contractor. The Contractor shall prepare the final deliverables incorporating the WAM's comments. Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1 - Prepare Work Plan

Contractor shall prepare a Work Plan (WP) for the Work Assignment (WA) as specified in the contract. The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, detailed cost estimate by task and a staffing plan. The WAM, the Project Officer (PO) and the Contracting Officer (CO) will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the Contractor by the CO. The Contractor shall prepare a revised Work Plan incorporating the CO's comments, if requested.

Task 2 – Workshop Planning Support

The Contractor shall assist with workshop planning. As directed by the EPA WAM through written technical direction, the Contractor shall find 3 venue choices in the Ann Arbor, MI area to hold the workshop at. The target dates will be set by the EPA WAM, sometime in April or May 2013, depending on facility availability. The workshop will be a day and three quarters program with an expected audience of 150- 250 attendees (100- 150 in-person and another 50 – 100 attendees via webinar). All sessions will be in plenary (no break-outs are expected). The facility shall have a speaker ready room and registration table for the workshop. Based on the three recommendations from the contractor, the EPA WAM will assess if they met the requirements. After her approval the contractor shall select and obtain the appropriate venue.

The Contractor shall assist with specific activities such as the following:

- Obtain workshop venue
- Develop contractor website for registration, agenda, hotel, map, and other venue information. Update the website periodically as information becomes available.

- Manage registration process (assume no registration fees), develop list of participants and contact information, and prepare name badges.
- Handle preparations for workshop, including, but not limited to such tasks as arranging for tables, chairs, power supply, audio-visual/webinare equipment, etc., as needed
- Coordination support for planning workshop sessions, such as
 - Contacting potential speakers named by the WAM, inviting speakers and following up with them for questions about audio visuals, timing, and logistics. No invitational travel or travel reimbursed by the contractor will be provided for.
 - At the written technical direction of the WAM, develop and maintain an agenda.
 - Organize speaker presentation electronic files in advance of the meeting.
- Set up webinar services and conduct a rehearsal for EPA to become familiar with the technology.
- E-mail invitations to attendee lists, provided by WAM, which includes 250 email addresses from the previous year's workshop.

The Contractor shall hold a one hour, bi-weekly (or as needed) conference calls with the EPA WAM to provide routine status updates and coordinate activities.

Task 3 – Onsite Workshop Support

During the workshop, the Contractor shall provide on-site assistance with the following functions:

- Registration and name badges, with assistance from EPA
- Copies of agendas and presentation materials
- Audio-visual equipment and organization of speaker presentation files
- Webinar set-up and support
- Summary of key discussion topics
- Overall support of the workshop and interaction with the venue.

For planning purposes, EPA estimates that 2 contractor personnel will be necessary to support the workshop for audio/visual/note taking/webinar support. EPA will provide 2 support personnel for the registration table.

Task 4 – Workshop Follow-up

After the workshop, the Contractor shall assist with the following:

- Prepare presentations for posting to the EPA website after the workshop
- Prepare draft summary of key discussion topics and main points of the workshop; incorporate EPA comments and prepare final summary

Travel

For planning purposes, it's estimated that 2 contractor personnel will travel to the workshop in the Ann Arbor, MI, area, specifically:

- All contractor personnel will stay for the duration of the 1.75 day workshop
- 1 contractor personnel for note taking and onsite interaction with the venue
- 1 contractor personnel for AV/webinar support

Summary

Deliverables	Date
Task 1 Work Plan	Per contract
Task 2 Workshop Planning	
Coordinate date of workshop with facility and WAM	Within 30 days of approved work plan
Obtain facility	Within 60 days of approved work plan
Workshop website	At least 60 days before workshop
Draft Agenda	30 days before workshop
Final Agenda, name badges, and materials	3 business days before the workshop
Remote webinar rehearsal	At least 1week prior to the workshop
Task 3 Onsite Workshop Support Deliverables	During workshop
Task 4 Workshop Follow up	
Website with presentations ready for uploaded to the EPA website	Within 2 business days of completion of the workshop
First draft of Summary	7 business days after completion of the workshop
Final summary	1 week after receipt of comments from EPA

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

1-03

☐ Other ☒ Amendment Number:

000001

Contract Number

EP-C-11-046

Contract Period 09/19/2011 To 08/31/2013

Base

Option Period Number 1

Title of Work Assignment/SF Site Name

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

Purpose:

☐

Work Assignment

☐

Work Assignment Close-Out

☒

Work Assignment Amendment

☐

Incremental Funding

☐

Work Plan Approval

Period of Performance

From 01/25/2013 To 08/31/2013

Comments:

The purpose of this amendment is to cancel the WA. No work shall continue under this WA. Please provide the WAM, PO and CO the incurred to date LOE and Cost for close-out purposes.

☐ Superfund**Accounting and Appropriations Data**☒ Non-Superfund

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

SFO
(Max 2)☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

09/19/2011 To 08/31/2013

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Astrid Larsen

Branch/Mail Code:

Phone Number 734-214-4812

FAX Number:

(Signature)

(Date)

Project Officer Name Joie Middlebrook

Branch/Mail Code:

Phone Number: 734-214-4934

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Angela Lower

Branch/Mail Code:

Phone Number: 513-487-2036

FAX Number:

(Signature)

(Date)

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-04 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046	Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1	Title of Work Assignment/SF Site Name EPA SmartWay Optimization								
Contractor EASTERN RESEARCH GROUP, INC.		Specify Section and paragraph of Contract SOW 1a, 2, 3								
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/01/2012 To 08/31/2013								
Comments: Supply Chain Optimization for FY2013										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:		LOE:						
Cumulative Approved:		Cost/Fee:		LOE:						
Work Assignment Manager Name Matthew Payne							Branch/Mail Code:			
_____ (Signature) (Date)							Phone Number 734-214-4576			
							FAX Number: 734-214-4906			
Project Officer Name Joie Middlebrook							Branch/Mail Code:			
_____ (Signature) (Date)							Phone Number: 734-214-4934			
							FAX Number:			
Other Agency Official Name							Branch/Mail Code:			
_____ (Signature) (Date)							Phone Number:			
							FAX Number:			
Contracting Official Name Angela Lower							Branch/Mail Code:			
_____ (Signature) (Date)							Phone Number: 513-487-2036			
							FAX Number:			

PERFORMANCE WORK STATEMENT

Title: EPA SmartWay Optimization

Contractor: Eastern Research Group

Contract Number: EP-C-11-046 WA 1-04

**Work Assignment Manager:
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Project Officer (PO): Joie Middlebrook
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Fax: 734-214-4052
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Contracting Officer (CO): Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

Period of Performance: Date of Issue to August 31, 2013

PURPOSE AND OVERVIEW

The purpose of this Work Assignment (WA) is to **optimize** the SmartWay 2.0 multimodal supply chain system (developed in the contract EP-C-07-078: WAs 1-04, 2-04, 3-04, 4-04 and current contract WA 0-04) that will provide a standardized method for transportation providers, and companies that employ transportation providers (shippers), to calculate their CO2 transportation footprint, fuel consumption, and emissions of traditional air pollutants including particulate matter (PM 2.5), and nitrogen oxides (NOx). This information will be used to calculate a SmartWay environmental score for transportation providers and shippers. The SmartWay score is a measure of environmental performance developed by the SmartWay program. Work performed in Work Assignments 1-04, 2-04, 3-04, 4-04 under EP-C-07-078 and 0-04 will provide the basis for this WA.

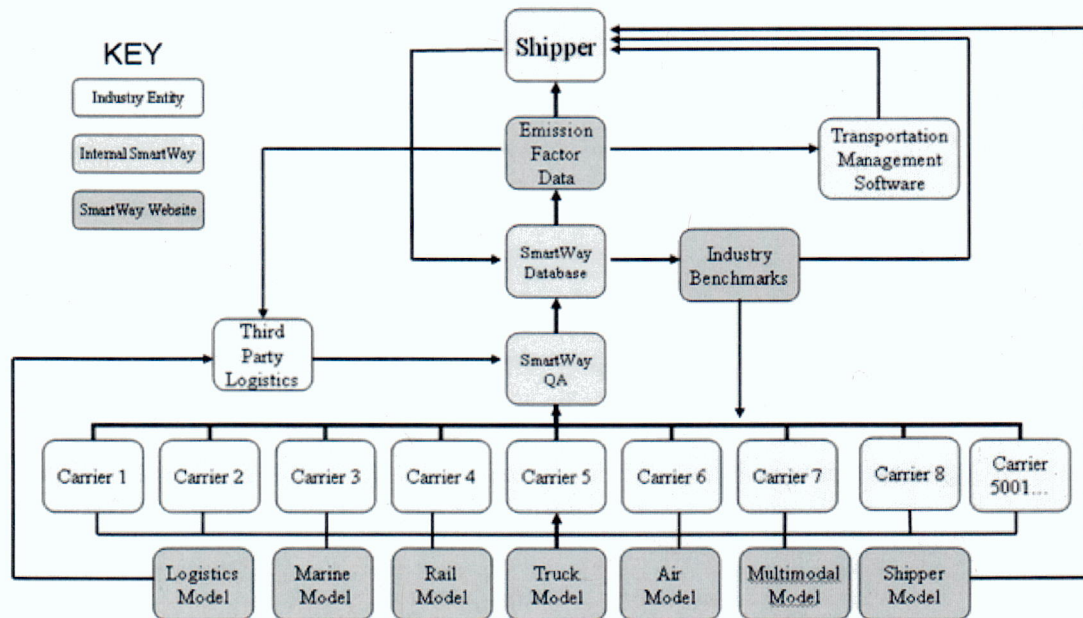
SUMMARY

The system consists of:

- 1.) Carrier tools that will collect information from carriers sufficient to provide the needed inputs to the database. These models must be simple to use, easy to understand, intuitive, have all computational background hidden from the user, and be easily uploadable to the database in a "one click" operation. There will be seven carriers models (listed in the schematic below)
- 2.) An Oracle based SmartWay database system that will store all information collected from all SmartWay tools, perform necessary calculations to determine program benefits, results, benchmarking, carrier ranking, and other calculations necessary for the SmartWay program to function. Additionally this database will serve as a Customer Relations Management (CRM) tool allowing SmartWay Partner Account Managers (PAMs) the ability to manage their partners, retrieve and report on data, perform analysis of data, and the system that EPA uses to manage and manipulate data that is sent to the database.
- 3.) A shipper tool, that will pull data from an online database and manipulate this data to produce emissions inventories and weighted g/mile outputs per mode, and per all modes. The shipper model shall be constructed such that additional metrics such as g/avg payload ton miles, etc can be easily incorporated into the existing model structure.
4. A publicly accessible file with an accompanying public database that will hold select information from the SmartWay database. This information must be accessible by shippers, as well as third party users such as logistical software companies, governments, researchers and consultants. Information must be easily uploadable to this database, so that the information in the database reflects the state of SmartWay within one day, at any given time.

Basic Supply Chain System Architecture

SmartWay 2.0



TASK 1

Develop Work Plan

The Contractor shall submit a project Work Plan identifying how the Contractor plans to accomplish the tasks, by task and subtask. The Contractor shall identify available information and/or contact resources: contractual, industry, and academic. The QAPP developed for the Base Period is acceptable for this work assignment.

TASK 2 Technical Research

The Contractor shall research, analyze, and/or develop data to support refinement of all components of the SmartWay system. Research methods may include literature searches, determining appropriate data sources, compilation of data, analyzing data for accuracy and appropriateness, determination and analyzing emission factors, and others as identified by the WAM through written technical direction. Any research shall be thoroughly documented and summarized in a format specified by the WAM through written technical direction.

It is anticipated that there will be:

- Five minor (1 day or less projects, involving relatively simple data research/production) technical research projects
- Five major (1 day or more projects that may involve heavy statistical analysis using multiple statistical methods, lengthy research with original sources both published and non-published, contacting additional experts, and/or interpreting data to draw conclusions and/or recommendations) technical research projects.

TASK 3 Educational and Recruiting Support

The Contractor shall support SmartWay efforts to educate the public, both domestic and international, public and private, about SmartWay, the SmartWay system, and individual SmartWay tools. These educational efforts may include: public speaking engagements, developing educational materials, training sessions, individual user support, developing journal articles, identification of educational opportunities, and event and workshop support. The Contractor shall assist SmartWay in recruiting new companies into the partnership. These recruiting efforts may include direct calls, emails, networking through professional organizations, developing recruiting target/informational lists, and assisting in the development of recruiting plans.

Anticipated needs include:

- At the direction of the WAM (through written technical direction), the Contractor shall prepare educational materials highlighting SmartWay. Approximately 50 pages of textual support materials shall be generated.
- The Contractor shall train EPA SmartWay staff on the use of the SmartWay database. This training is expected to be four days for one contractor personnel over the course of the period of performance. Training Dates will be provided to ERG 4 weeks prior to Training through written Technical Direction.
- The Contractor shall maintain a current SmartWay database technical manual.
- The Contractor may be asked, at the written direction of the WAM, to contact partners directly to provide help on tool and/or program questions. It is anticipated that there will be 50 such specific interventions in Option Period I.

- Through written technical direction from the WAM, the Contractor shall assist SmartWay in the drafting of scholarly articles for educating the public about SmartWay. It is anticipated that there will be ten such articles in the current Period of Performance (PoP).
- The Contractor shall inform EPA SmartWay staff about promotional opportunities that the Contractor discovers in their normal course of business working on SmartWay. At the written direction of the WAM, the Contractor shall follow up on these leads and gather additional information about these leads. The Contractor shall assume ten new leads during this period.
- The Contractor shall provide logistics and conference support for three SmartWay conferences in Option Period I. Conference support will entail manning check-in desks, providing signage, summary notes, and other logistical support. Travel associated with the conference support is anticipated to be seven travel days.

TASK 4 SmartWay Carrier Tool Optimization

The Contractor shall optimize, using materials, examples, mock-ups, and/or written direction from the WAM, all SmartWay tools and all technical user manuals and user guides. This shall include programming changes, added functionality, additional display and analysis capability, better user interfaces, possible web based functionality, and/or other optimizations. All changes shall be thoroughly documented in both the technical manuals and user guides.

Truck Tool: Further optimization of the truck tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes and an annual update for MOVES system factors. It is possible that SmartWay will begin development of online web based submission tools. Changes to the tool shall be tracked and catalogued in the truck tool update file. There will be approximately:

- 75 minor (two hour or less programming time)
- 25 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 truck tool. All changes shall be properly updated in the user guide and technical documentation.

Logistics Tool: Further optimization of the logistics tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use

issues, textual clarifications, minor, medium and major structural changes and enhancing functionality. Changes to the tool shall be tracked and catalogued in the Logistics tool update file. There will be approximately:

- 50 minor (two hour or less programming time)
- 20 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 logistics tool. All changes shall be properly updated in the user guide and technical documentation.

Multi-modal Tool: Further optimization of the multi-modal tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the multi-modal tool update file. There will be approximately:

- 50 minor (two hour or less programming time)
- 10 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 multi-modal tool. All changes shall be properly updated in the user guide and technical documentation.

Rail Tool: Further optimization of the rail tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the rail tool update file. There will be approximately

- 50 minor (two hour or less programming time)
- 25 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 rail tool. All changes shall be properly updated in the user guide and technical documentation.

Marine Tool: Further optimization of the marine tool shall be done at the direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the marine tool update file. There will be approximately:

- 100 minor (two hour or less programming time)
- 50 medium (one day or less programming time)
- 5 major (one week or less programming time)

changes for the 2012 marine tool. All changes shall be properly updated in the user guide and technical documentation. Significant stakeholder interaction is anticipated, which may include participating in research gathering efforts, and participating in conference calls.

- 10 minor outreach interactions (one hour or less)
- 5 medium outreach interactions (one day or less)
- 5 major outreach interactions (two days or less)

Air Tool: Further optimization of the marine tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the air tool update file. There will be approximately:

- 75 minor (two hour or less programming time)
- 25 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 air tool. All changes shall be properly updated in the user guide and technical documentation. Significant stakeholder interaction is anticipated, which may include participating in research gathering efforts, and participating in conference calls.

- 10 minor outreach interactions (one hour or less)
- 5 medium outreach interactions (one day or less)
- 5 major outreach interactions (two days or less)

TASK 5: SmartWay Shipper Tool Optimization

The Contractor shall optimize, using materials, examples, mock-ups, and/or written direction from the WAM, all SmartWay 2.0 tools and all technical user manuals, and user guides. This shall include programming changes, added functionality, additional display and analysis capability, better user interfaces, possible web based functionality, and/or other optimizations. All changes shall be thoroughly documented in both the technical manual and user guides.

Shipper Tool: Further optimization of the shipper tool shall be done at the written direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor structural changes, enhancing speed functionality, and expanding the functionality of the shipper strategy and modal shift tabs. Changes to the tool shall be tracked and catalogued in the shipper tool update file. There will be

- 75 minor (two hour or less programming time)
- 25 medium (one day or less programming time)

- 4 major (one week or less programming time)

changes for the shipper tool. All changes shall be properly updated in the user guide and technical documentation.

TASK 6 Database Development, Optimization and Preparation for Transfer to EPA Server

The Contractor shall optimize the SmartWay database and interactive processes between the SmartWay models, the SmartWay database, and the SmartWay website. The Contractor shall provide secure backup copies of all data to the EPA WAM on a weekly basis and shall properly document all changes made to the database such that the database optimization and /or management is able to be assumed by another party instantaneously. The Contractor shall insure no interruption of service by replicating the database in two geographically distinct locations. Proper documentation regarding database architecture shall be maintained at all times. A database user guide shall be maintained and kept up to date at all times. Although a change in database administration or programming is anticipated for 2013, the Contractor shall maintain all database documentation at a level which would allow a new programmer or Contractor to assume programming and maintenance of the database without any interruption in service. Although not anticipated for 2013, the Contractor shall be prepared to transfer all database functions to EPA following all EPA rules and procedures. At the written technical direction of the WAM, Contractor staff shall assist EPA staff in database transfer and continue support as requested after transfer.

Contractor programming changes to the database are anticipated to be:

- 200 minor (two hour or less programming time)
- 50 medium (one day or less programming time)
- 10 major (one week or less programming time)

changes made to the database during the current PoP. A training session for Ann Arbor staff consisting of 3 travel days shall be conducted.

TASK 7 International Replication

The Contractor shall assist SmartWay to propagate the SmartWay system internationally. Contractor support under this task could involve coordination with foreign trade groups, environmental organizations, companies, entities, and/or governments. Work involved could include stakeholder development, program design, tool development, and technical assistance to assist other countries with implementation of the SmartWay work conducted in tasks 2 through 6. EPA anticipates:

- 5 minor outreach interactions (one hour or less)
- 3 medium outreach interactions (one day or less)
- 1 major outreach interactions (two days or less)

TASK 8 SmartWay Users Group Development

At the written technical direction of the WAM, the Contractor shall assist SmartWay to develop and establish a SmartWay industry users group. This group shall function as a private industry group for the purpose of educating members about the SmartWay program. This will include approximately:

- 5 minor outreach interactions (one hour or less)
- 3 medium outreach interactions (one day or less)
- 1 major outreach interactions (two days or less)

TASK 9 Data Verification

At the written technical direction of the WAM, the Contractor shall assist SmartWay to develop a SmartWay data verification system. The purpose of this system will be to verify that the data submitted to SmartWay is accurate, representative, and is truthful. The Contractor shall explore, research, and develop concepts and support structures to enable a data verification program. This system may be contained wholly or in part within the SmartWay program, or may exist outside of the SmartWay program in the form of third party verification. The Contractor shall investigate opportunities to establish cooperative processes with other Federal agencies and/or departments, private industry certifications such as International Standards Organization (ISO) standard certification, and/or other forms of data verification. SmartWay assumes a minimal level of support on this task initially, to include:

- 10 minor outreach interactions (one hour or less)
- 5 medium outreach interactions (one day or less)
- 3 major outreach interactions (two days or less)

TASK 10 SmartWay Partner Account Management Support

At the written technical direction of the WAM, the Contractor shall provide Partner Account Management support to the SmartWay program. This will be assigned on an overflow basis when EPA SmartWay staff is unable to maintain a satisfactory level of service to SmartWay partners given current staffing levels. The Contractor shall be ready to provide PAM support within two weeks of request. Although no level of effort other than providing for the infrastructure of said support is included in this task, the WAM may direct the Contractor in writing to engage in PAM activities at a future date. Technical direction and funding will be supplied at that time. SmartWay assumes a minimal level of support on this task initially to include:

- 5 minor outreach interactions (one hour or less)

Deliverables

Task #	Task Designation	Deliverables	Deliverable Date
1	Workplan	Detailed work plan addressing all aspects of the PWS, QAPP Updated	within two weeks of receipt of this WA
2	Technical Research	Documented research, due as within 2 weeks of technical direction.	through 8/31/2013
3	Educational Support	Properly executed educational support, due within 2 weeks of technical direction. Seven one person travels days are associated with this task.	through 8/31/2013
4	Model Optimization-Carriers	Fully functioning optimized carrier models, documentation, user guides Deadlines as described in attachment A: SmartWay timeline	through 8/31/2013
5	Model Optimization-Shipper	Fully functioning optimized shipper/logistics models, documentation, user guides Deadlines as described in attachment A: SmartWay timeline	through 8/31/2013
6	Database Development and Optimization	Fully functional optimized database and model-database-website communication system, weekly secure data backup, 3 days of site visits to Ann Arbor for one staff Deadlines as described in attachment A: SmartWay timeline	through 8/31/2013
7	International Replication	Outreach interactions performed satisfactorily within six months of technical direction.	through 8/31/2013

8	SmartWay Users Group	Outreach interactions performed satisfactorily within six months of technical direction.	through 8/31/2013
9	Data Verification	Data verification system	through 8/31/2013
10	PAM Support	Properly executed PAM management within 2 days after receipt of technical direction.	through 8/31/2013

TRAVEL:

Travel is anticipated with this Work Assignment, and potentially consists of three travel days for database training, and seven travel days for support services associated with conferences in task three.

REPORTING REQUIREMENTS

The Contractor shall prepare its Work Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

1-04



Other



Amendment Number:

000001

Contract Number

EP-C-11-046

Contract Period 09/19/2011 To 08/31/2013

Base

Option Period Number 1

Title of Work Assignment/SF Site Name

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 09/01/2012 To 08/31/2013

Comments:

The purpose of this Amendment is to change the Alt WAM to Tracie Jackson Hall PH: 734-214-4871



Superfund

Accounting and Appropriations Data



Non-Superfund

SFO
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

09/19/2011 To 08/31/2013

LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Matthew Payne

(Signature)

(Date)

Branch/Mail Code:

Phone Number 734-214-4576

FAX Number: 734-214-4906

Project Officer Name Joie Middlebrook

(Signature)

(Date)

Branch/Mail Code:

Phone Number: 734-214-4934

FAX Number:

Other Agency Official Name

(Signature)

(Date)

Branch/Mail Code:

Phone Number:

FAX Number:

Contracting Official Name Angela Lower

(Signature)

(Date)

Branch/Mail Code:

Phone Number: 513-487-2036

FAX Number:



United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number
WA 1-04

Contract Number
EPC-11-046

Contract Period
Base

Option Period Number
1

[] Original [X] Amendment Number: 1

Title of Work Assignment
SmartWay Transport Partnership SmartWay 2.0
Optimization

Contractor
ERG

Specify Section and Paragraph of Contract SOW
Sections 2, 3, 1a

Purpose: [] Work Assignment Initiation [] Work Assignment Close-Out
[X] Work Assignment Amendment [] Incremental Funding
[] Work Plan Approval

Periods of Performance

From: November 1, 2012 To: August 31, 2013

Comments:

Change AltWAM from E. Herzog to T. Jackson-Hall

[] Superfund

Accounting and Appropriations Data

[X] Non-Superfund

Line	DC (Max 6)	Budget/FYs (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount	(Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1											
2											
3											
4											
5											

Authorized Work Assignment Ceiling

LOE

Contract Period:

Cost/Fee

This Action

TOTAL

Work Plan / Cost Estimate Approvals

LOE:

Contractor WP Dated :

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

Work Assignment Manager Name

M. Payne

04/09/13

(Signature)(Date)

Branch/Mail Code TCD

Phone Number 734-214-

Fax Number 734-214-4906

Branch/Mail Code TCD

Phone Number 734-214-4934

Fax Number 734-214-4906

Branch/Mail Code

Phone Number 734/214-

Fax Number 734/214-

Branch/Mail Code CMD

Phone Number 513/487-2036

Fax Number

Joie Middlebrook Project Officer Name

04/09/13

(Signature)

Other Agency Official Name

(Signature)

Contracting Official Name

Angela Lower

(Signature)

Contractor Acknowledgement of Receipt and Approval of Workplan (Signature and Title)

Date

PERFORMANCE WORK STATEMENT

Title: EPA SmartWay Optimization

Contractor: Eastern Research Group

Contract Number: EP-C-11-046 WA 1-04 Amendment 1

**Work Assignment Manager:
(WAM)** Matthew Payne
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Phone: 734-214-4576
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Alternate WAM Tracie Jackson-Hall
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Project Officer (PO): Joie Middlebrook
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Phone: 734-214-4934
Fax: 734-214-4052
Email: middlebrook.joie@epa.gov

Contracting Officer (CO): Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

Period of Performance: Date of Issue to August 31, 2013

The purpose of this Work Assignment Amendment to change the Alternate WAM and revise the scope under the following Tasks 2, 4, 5 and 6. All other tasks, deliverables and schedules remain unchanged.

PURPOSE AND OVERVIEW

The purpose of this Work Assignment (WA) is to **optimize** the SmartWay 2.0 multimodal supply chain system (developed in the contract EP-C-07-078: WAs 1-04, 2-04, 3-04, 4-04 and current contract WA 0-04) that will provide a standardized method for transportation providers, and companies that employ transportation providers (shippers), to calculate their CO2 transportation footprint, fuel consumption, and emissions of traditional air pollutants including particulate matter (PM 2.5), and nitrogen oxides (NOx). This information will be used to calculate a SmartWay environmental score for transportation providers and shippers. The SmartWay score is a measure of environmental performance developed by the SmartWay program. Work performed in Work Assignments 1-04, 2-04, 3-04, 4-04 under EP-C-07-078 and 0-04 will provide the basis for this WA.

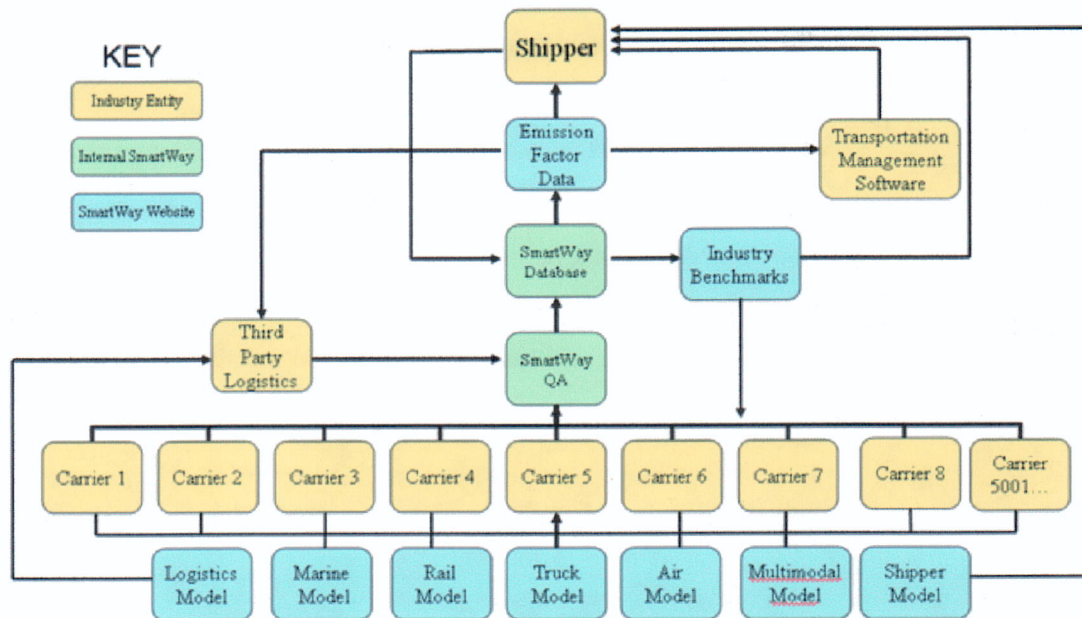
SUMMARY

The system consists of:

- 1.) Carrier tools that will collect information from carriers sufficient to provide the needed inputs to the database. These models must be simple to use, easy to understand, intuitive, have all computational background hidden from the user, and be easily uploadable to the database in a "one click" operation. There will be seven carriers models (listed in the schematic below)
- 2.) An Oracle based SmartWay database system that will store all information collected from all SmartWay tools, perform necessary calculations to determine program benefits, results, benchmarking, carrier ranking, and other calculations necessary for the SmartWay program to function. Additionally this database will serve as a Customer Relations Management (CRM) tool allowing SmartWay Partner Account Managers (PAMs) the ability to manage their partners, retrieve and report on data, perform analysis of data, and the system that EPA uses to manage and manipulate data that is sent to the database.
- 3.) A shipper tool, that will pull data from an online database and manipulate this data to produce emissions inventories and weighted g/mile outputs per mode, and per all modes. The shipper model shall be constructed such that additional metrics such as g/avg payload ton miles, etc can be easily incorporated into the existing model structure.
4. A publicly accessible file with an accompanying public database that will hold select information from the SmartWay database. This information must be accessible by shippers, as well as third party users such as logistical software companies, governments, researchers and consultants. Information must be easily uploadable to this database, so that the information in the database reflects the state of SmartWay within one day, at any given time.

Basic Supply Chain System Architecture

SmartWay 2.0



TASK 1

Develop Work Plan

The Contractor shall submit a project Work Plan identifying how the Contractor plans to accomplish the tasks, by task and subtask. The Contractor shall identify available information and/or contact resources: contractual, industry, and academic. The QAPP developed for the Base Period is acceptable for this work assignment.

TASK 2 Technical Research

The Contractor shall research, analyze, and/or develop data to support refinement of all components of the SmartWay system. Research methods may include literature searches, determining appropriate data sources, compilation of data, analyzing data for accuracy and appropriateness, determination and analyzing emission factors, and others as identified by the WAM through written technical direction. Any research shall be thoroughly documented and summarized in a format specified by the WAM through written technical direction.

It is anticipated that there will be:

- Two minor (1 day or less projects, involving relatively simple data research/production) technical research projects
- Two major (1 day or more projects that may involve heavy statistical analysis using multiple statistical methods, lengthy research with original sources both published and non-published, contacting additional experts, and/or interpreting data to draw conclusions and/or recommendations) technical research projects.

TASK 3 Educational and Recruiting Support : Remains Unchanged

TASK 4 SmartWay Carrier Tool Optimization

The Contractor shall optimize, using materials, examples, mock-ups, and/or written direction from the WAM, all SmartWay tools and all technical user manuals and user guides. This shall include programming changes, added functionality, additional display and analysis capability, better user interfaces, possible web based functionality, and/or other optimizations. All changes shall be thoroughly documented in both the technical manuals and user guides.

Truck Tool: Further optimization of the truck tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes and an annual update for MOVES system factors. It is possible that SmartWay will begin development of online web based submission tools. Changes to the tool shall be tracked and catalogued in the truck tool update file. There will be approximately:

- 25 minor (two hour or less programming time)
- 10 medium (one day or less programming time)
- 1 major (one week or less programming time)

changes for the 2012 truck tool. All changes shall be properly updated in the user guide and technical documentation.

Logistics Tool: Further optimization of the logistics tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes and enhancing functionality. Changes to the tool shall be tracked and catalogued in the Logistics tool update file. There will be approximately:

- 15 minor (two hour or less programming time)
- 5 medium (one day or less programming time)
- 1 major (one week or less programming time)

changes for the 2012 logistics tool. All changes shall be properly updated in the user guide and technical documentation.

Multi-modal Tool: Further optimization of the multi-modal tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the multi-modal tool update file. There will be approximately:

- 25 minor (two hour or less programming time)
- 5 medium (one day or less programming time)
- 1 major (one week or less programming time)

changes for the 2012 multi-modal tool. All changes shall be properly updated in the user guide and technical documentation.

Rail Tool: Further optimization of the rail tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the rail tool update file. There will be approximately

- 10 minor (two hour or less programming time)
- 5 medium (one day or less programming time)
- 1 major (one week or less programming time)

changes for the 2012 rail tool. All changes shall be properly updated in the user guide and technical documentation.

Marine Tool: Further optimization of the marine tool shall be done at the direction of the WAM. Optimization is expected to center around ease-of-use issues, textual

clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the marine tool update file. There will be approximately:

- 50 minor (two hour or less programming time)
- 25 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 marine tool. All changes shall be properly updated in the user guide and technical documentation.

Air Tool: Further optimization of the marine tool shall be done at the written technical direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor, medium and major structural changes. Changes to the tool shall be tracked and catalogued in the air tool update file. There will be approximately:

- 75 minor (two hour or less programming time)
- 25 medium (one day or less programming time)
- 2 major (one week or less programming time)

changes for the 2012 air tool. All changes shall be properly updated in the user guide and technical documentation. Significant stakeholder interaction is anticipated, which may include participating in research gathering efforts, and participating in conference calls.

- 10 minor outreach interactions (one hour or less)
- 5 medium outreach interactions (one day or less)
- 5 major outreach interactions (two days or less)

TASK 5: SmartWay Shipper Tool Optimization

The Contractor shall optimize, using materials, examples, mock-ups, and/or written direction from the WAM, all SmartWay 2.0 tools and all technical user manuals, and user guides. This shall include programming changes, added functionality, additional display and analysis capability, better user interfaces, possible web based functionality, and/or other optimizations. All changes shall be thoroughly documented in both the technical manual and user guides.

Shipper Tool: Further optimization of the shipper tool shall be done at the written direction of the WAM. Optimization is expected to center around ease-of-use issues, textual clarifications, minor structural changes, enhancing speed functionality, and expanding the functionality of the shipper strategy and modal shift tabs. Changes to the tool shall be tracked and catalogued in the shipper tool update file. There will be

- 50 minor (two hour or less programming time)
- 15 medium (one day or less programming time)

- 1 major (one week or less programming time)

changes for the shipper tool. All changes shall be properly updated in the user guide and technical documentation.

TASK 6 Database Development, Optimization and Preparation for Transfer to EPA Server

The Contractor shall optimize the SmartWay database and interactive processes between the SmartWay models, the SmartWay database, and the SmartWay website. The Contractor shall provide secure backup copies of all data to the EPA WAM on a weekly basis and shall properly document all changes made to the database such that the database optimization and /or management is able to be assumed by another party instantaneously. The Contractor shall insure no interruption of service by replicating the database in two geographically distinct locations. Proper documentation regarding database architecture shall be maintained at all times. A database user guide shall be maintained and kept up to date at all times. Although a change in database administration or programming is anticipated for 2013, the Contractor shall maintain all database documentation at a level which would allow a new programmer or Contractor to assume programming and maintenance of the database without any interruption in service. Although not anticipated for 2013, the Contractor shall be prepared to transfer all database functions to EPA following all EPA rules and procedures. At the written technical direction of the WAM, Contractor staff shall assist EPA staff in database transfer and continue support as requested after transfer.

Contractor programming changes to the database are anticipated to be:

- 100 minor (two hour or less programming time)
- 20 medium (one day or less programming time)
- 5 major (one week or less programming time)

changes made to the database during the current PoP. A training session for Ann Arbor staff consisting of 3 travel days shall be conducted.

TASK 7 International Replication-Remains Unchanged

TASK 8 SmartWay Users Group Development-Remains Unchanged

TASK 9 Data Verification- Remains Unchanged

No additional work

TASK 10 SmartWay Partner Account Management Support-Remains Unchanged

No additional work

Deliverables

Task #	Task Designation	Deliverables	Deliverable Date
1	Workplan	Detailed work plan addressing all aspects of the PWS, QAPP Updated	within two weeks of receipt of this WA
2	Technical Research	Documented research, due as within 2 weeks of technical direction.	through 8/31/2013
3	Educational Support	Remains unchanged	
4	Model Optimization-Carriers	Fully functioning optimized carrier models, documentation, user guides Deadlines as described in attachment A: SmartWay timeline	through 8/31/2013
5	Model Optimization-Shipper	Fully functioning optimized shipper/logistics models, documentation, user guides Deadlines as described in attachment A: SmartWay timeline	through 8/31/2013
6	Database Development and Optimization	Fully functional optimized database and model-database-website communication system, weekly secure data backup,	through 8/31/2013
7	International Replication	Remains Unchanged	through 8/31/2013

8	SmartWay Users Group	Remains Unchanged	through 8/31/2013
9	Data Verification	Remains Unchanged	through 8/31/2013
10	PAM Support	Remains Unchanged	through 8/31/2013

TRAVEL:

No travel is anticipated with this Work Assignment amendment

REPORTING REQUIREMENTS

The Contractor shall prepare its Work Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-05 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base <input checked="" type="checkbox"/> Option Period Number								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name SmartWay Workbook								
Specify Section and paragraph of Contract SOW 1.a. Marketing Support, Special Reports, etc.		Period of Performance From 02/21/2013 To 08/31/2013								
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval										
Comments:										
<input type="checkbox"/> Superfund		Accounting and Appropriations Data								
<input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:		LOE:						
Cumulative Approved:		Cost/Fee:		LOE:						
Work Assignment Manager Name Buddy Polovick _____ (Signature) (Date)						Branch/Mail Code: Phone Number 734-214-4928 FAX Number:				
Project Officer Name Joie Middlebrook _____ (Signature) (Date)						Branch/Mail Code: Phone Number: 734-214-4934 FAX Number:				
Other Agency Official Name _____ (Signature) (Date)						Branch/Mail Code: Phone Number: FAX Number:				
Contracting Official Name Angela Lower _____ (Signature) (Date)						Branch/Mail Code: Phone Number: 513-487-2036 FAX Number:				

PERFORMANCE WORK STATEMENT (PWS)

Title: SmartWay International Workbook and Curriculum

Contractor: ERG

Contract No.: EP-C-11-046

Work Assignment Number:

WA1-05

Period of Performance:

Date of issue to August 31, 2013

Work Assignment Manager (WAM):

Christopher Polovick
2000 Traverwood Drive
Ann Arbor, MI 48105
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Fax: 734/214-4052
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Alternate WAM

Patrice Thornton
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Project Officer (PO):

Joie Middlebrook
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Phone: 734-214-4934
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middlebrook.joie@epa.gov

Contracting Officer (CO):

Angela Lower
Phone: 513-487-2036
lower.angela@epa.gov

Background and Purpose:

The SmartWay Transport Partnership is a joint public-private partnership aimed at reducing emissions and improving fuel efficiency of the freight sector. This voluntary, market based program includes many features, including performance benchmarking and reporting tools, a partnership process, technology programs, financing, branding, marketing and education. The program is designed to provide market incentives for companies, such as freight carriers, shippers, logistics firms and others to accelerate the adoption of technologies and strategies that

reduce emissions and fuel costs. The data generated by partners helps the industry to identify ways to optimize carbon performance and reduce costs. The program has demonstrated significant fuel savings as well as reductions of GHG, NOX and PM emissions. These benefits enhance energy security and stimulate economic growth while making the freight sector more competitive and sustainable in the long run.

The success of the program in the U.S. has captured the attention of other countries, non-governmental organizations (NGOs) and development organizations, which are working to implement freight sustainability programs that replicate SmartWay. EPA has engaged with several countries to assist with capacity building and provided training, including at the 2008 SmartWay International Summit. A training workbook was developed and used for these efforts, however the workbook is out of date and needs significant revision and updating.

The purpose of this WA is to develop a substantive new SmartWay workbook for EPA to use as part a training curriculum and workshops, domestically and abroad. The intended purpose of the workbook is to train counterpart agencies, public sector policy makers and program developers how to design, build and implement public-private partnerships in other countries that replicate the SmartWay program's design, tools, methods and processes. Under this Work Assignment, the Contractor shall develop a new workbook which will be used by EPA and others in a series of global workshops and training over the next 2-3 years. The workbook shall have enough depth and content that it can be used in a multiday training curriculum, but can also be scaled down for shorter half-day sessions, or used independent of EPA training support.

Tasks and Deliverables:

Contractor shall provide all deliverables, as detailed in the Tasks below, first in draft form. The EPA WAM will review all deliverables in draft and provide revisions and/or comments to the Contractor. Contractor shall prepare the final deliverables incorporating the WAM's comments. All deliverables shall be submitted in Agency-standard electronic format. Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees.

Task 1 - Prepare Workplan

Contractor shall prepare a Work Plan for the Work Assignment as specified in the contract. The Work Plan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, and a detailed cost estimate by task and a staffing plan. The EPA WAM, PO, and CO will review the Work Plan. However, only the EPA CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions, if any will be given to the Contractor by the CO. Contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

Schedule of Deliverables for Task 1

Contractor shall submit a Work Plan for approval to the EPA WAM within two calendar weeks of receiving the Work Assignment from EPA.

Task 2 – Develop outline for new SmartWay Workbook

EPA has an existing workbook which has been used in numerous training efforts domestically and abroad over the last 4 years. The Contractor shall review the existing workbook and subsequent revisions. The Contractor shall prepare a summary document that serves as an outline for the new SmartWay workbook in the context of related curriculum needed to train policy makers how to design, build and implement a freight sustainability partnership like SmartWay. This work includes summaries and elements as described below.

Outline for new SmartWay Workbook

Contractor shall develop a detailed outline for the workbook that shall be based on, but not exclusive, to the current version.

- All conceivable facets and features of the current SmartWay program, brand and partnership shall be covered in the workbook.
- The goal of the training shall be to build the capacity for policy makers to replicate the SmartWay program in their own countries. Once training is completed, they will have a good roadmap and process to move forward to implement these programs.
- The design shall be modular, so as to allow for select components of the training to be stand alone and capable of being used individually.
- The workbook shall have enough depth and content that it can be used in a multiday training curriculum, with at least one full day of workbook training, plus other related subjects, but can also be scaled down for shorter half-day sessions.
- The workbook shall have enough depth and content that it will be at least 100 pages but not more than 200 pages.
- The workbook should be a standalone product that is substantive enough that it can be downloaded or sent abroad and used by policy makers without EPA or other trainers.
- The workbook should include optional interactive exercises for most, if not all, of the modules, or chapters, that would be used by a trainer to engage the class on key areas of discussion and exploration, especially it pertains to local or regional needs and challenges.
- The workbook shall also be developed with the intent that it will be translated into other languages, by other parties in the future.

Schedule of Deliverables for Task 2

Contractor shall begin work on Task 2 immediately after receiving approval of the Work Plan by EPA. EPA will provide the current workbook and prioritize activities under Task 2 through written technical direction. The Contractor will submit the workbook outline in draft to the EPA WAM within four weeks of receiving approval of the Work Plan.

All deliverables for this task will be submitted to EPA via email in electronic files format, unless otherwise specified.

The EPA WAM will meet with Contractor, via phone calls that typically will take an hour or less, to discuss progress and any questions or issues on a weekly basis, unless the WAM specifies otherwise (e.g., no meeting required for a given week).

Task 3 – Write Workbook and Curriculum

Based on EPA approval of the workbook outline, the Contractor shall write and publish a complete workbook ready for use in training. The Contractor shall prepare a draft workbook, accept EPA revisions and edits and revising accordingly. The Contractor shall complete no more than two substantive revisions based on EPA comment and no more than two final refinements. Upon completion, the Contractor shall translate the workbook into Spanish, Portugese and Chinese (Mandarin). Each version shall be provided in electronic file formats in each language along with a separate and complete curriculum outline that will include the workbook as a core element. This work includes summaries and analyses as described in subtasks 1, 2, and 3 below.

Subtask 1- Write the new SmartWay Workbook

Contractor shall write the workbook per the outline in Task 2.

- The workbook format shall be based on MS Word and/or Powerpoint formats
- The electronic version may have room for imbedded videos, as appropriate to content
- A final version will be provided in PDF and open file format for future editing and updating by other parties
- Efforts shall be made to minimize electronic file size where possible.

Subtask 2- Translate the new SmartWay Workbook

Contractor shall translate the workbook to Spanish, Portugese and Chinese (Mandarin).

- Separate electronic files for each version shall be provided to EPA.
- The curriculum described below shall also be translated into Spanish, Portugese and Chinese (Mandarin) and provided to EPA.

Subtask 3- Produce an outline for comprehensive SmartWay Training Curriculum with the SmartWay Workbook as focal point

Contractor shall develop a suggested curriculum template for complete and comprehensive training for policy makers that uses the workbook as a focal point.

- The curriculum should be a multiday (2-4) training that includes a workshop that uses the workbook, complementary content, study tours, and other related activities.
- The curriculum template should be designed to be adaptable and scalable to suit local needs and opportunities.
- The curriculum can suggest other products or content, and potential sources, as placeholders, that may need to be developed or enhanced at a later date. This can include content sessions on, Black Carbon, Carbon Accounting and Reporting, Technology Verification, Benchmarking Tools, Financing Programs, Emissions Inventory Development, etc.

Schedule of Deliverables for Task 3

Contractor shall begin work on Task 3 immediately after receiving approval of the workbook outline by EPA under Task 2. EPA will prioritize activities under Task 3 through written technical direction. The Contractor shall submit the first workbook draft to the EPA WAM within six weeks of receiving approval of the outline. Each subsequent draft shall be received by EPA within two weeks after receipt of EPA comments. The published copies shall be received

by EPA within four weeks of final approval of the workbook. The curriculum outline is to be submitted four weeks before the end of the WA Period of Performance.

All deliverables for this task will also be submitted to EPA via email in electronic files format, unless otherwise specified.

The EPA WAM will meet with Contractor, via phone calls that typically will take an hour or less, to discuss progress and any questions or issues on a weekly basis, unless the WAM specifies otherwise (e.g., no meeting required for a given week).

REPORTING REQUIREMENTS

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within two days of its issuance. Technical Direction must be within the scope of the Performance Work Statement and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75 percent of the funds and/or hours for this work have been expended.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-06								
		<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name SmartWay: Best Practices Guid								
Specify Section and paragraph of Contract SOW 1a										
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/01/2012 To 08/31/2013								
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund <div style="text-align: center;">Accounting and Appropriations Data</div> <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE:				
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:				LOE:				
Cumulative Approved:		Cost/Fee:				LOE:				
Work Assignment Manager Name Patty Klavon						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number 734-214-4476				
						FAX Number:				
Project Officer Name Joie Middlebrook						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number: 734-214-4934				
						FAX Number:				
Other Agency Official Name						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number:				
						FAX Number:				
Contracting Official Name Angela Lower						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number: 513-487-2036				
						FAX Number:				

PERFORMANCE WORK STATEMENT

Title: SmartWay Transport: Data Quality Assurance and Quality Control (QA/QC) Best Practices

Contractor and Contract Number: Eastern Research Group
EP-C-11-046

Work Assignment Number: 1-06

Work Assignment Manager (WAM): Patty Klavon
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Project Officer (PO): Joie Middlebrook
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Contracting Officer: Angela Lower
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PERIOD OF PERFORMANCE: Effective Date to August 31, 2013

I. BACKGROUND

The U.S. Environmental Protection Agency (EPA) established the SmartWay® Transport Partnership (SmartWay) in 2004. It is a voluntary collaboration between EPA and the ground freight industry to improve fuel efficiency and to reduce environmental impacts from freight transport.

Thousands of businesses and organizations need SmartWay and the information it gathers from its partners to calculate their environmental performance. Over 3,000 of the nation's truck carriers, all the class one rail companies, and many of the top Fortune 500 companies use SmartWay's supply chain accounting tools and methods to calculate their transportation-related emissions. Environmental, state, and community groups also rely upon SmartWay's clean air achievements in protecting the health and well-being of U.S. citizens.

Thus, EPA has a strong interest in protecting the integrity of the SmartWay program. To that end, EPA - as part of a five-step action plan to identify best practices in SmartWay data QA/QC - conducted site visits during 2012 with 13 SmartWay shippers, carriers and logistics partners. These partners have demonstrated SmartWay program compliance with a credible quality process or certification program, such as International Standardization Organization (ISO) certification, Six-Sigma designation or a similar quality assurance system. During these site visits, EPA observed and recorded the processes and safeguards employed by these partners to collect, store, check, manage, track, and preserve the data reported in their SmartWay reporting tool submissions. EPA staff also interviewed key staff involved in data collection and review to clarify how their data management and quality assurance measures ensure SmartWay data validity. EPA then assessed and synthesized the results of these interviews into a comprehensive and consistent set of best practices that are published in this guidance document.

The purpose of this guidance is two-fold:

1. To showcase how SmartWay partners are leading the way in data quality in the freight transportation industry via a compilation of best practices identified through the five-step action plan. The compilation document will demonstrate how participation in SmartWay can help partners improve the integrity of their freight transportation data.
2. To document data QA/QC practices of other climate-based partnership programs based in the U.S. and globally. The information will be used by SmartWay for benchmarking purposes and to enhance SmartWay data QA/QC strategies where appropriate and feasible.

II. CONTRACT LEVEL STATEMENT OF WORK REFERENCE

The tasks to be performed under Task 2 of this work assignment are consistent with the work authorized under Task 1a. of the contract's performance work statement: Marketing Support, Special Reports, and Creative Materials. The tasks to be performed under Task 3 of this work assignment are consistent with the work authorized under Tasks 2: Data Management, and 3: Program and Emissions Analyses of the contract's performance work statement.

III. OBJECTIVE

Under this work assignment, the Contractor shall work with the EPA to build upon and refine EPA's text for the guidance document, provide additional editorial review and design suggestions, incorporate comments, identify a colorful and visually appealing layout, and finalize the document once all comments have been approved.

The Contractor shall also gather, compile and analyze current information about existing data QA/QC efforts of certain climate-based voluntary partnership programs located in the U.S. and worldwide. To achieve this objective, this work assignment requires the following tasks:

Task 1: Work Plan Preparation and Kickoff meeting

The Contractor shall prepare a Work Plan for the Work Assignment as specified in the contract. The Work Plan shall outline, describe and include the approach, resources, timeline and due dates for deliverables, detailed cost estimate by task and a staffing plan. The Work Assignment Manager (WAM), the Project Officer (PO) and the Contracting Officer (CO) will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the Contractor by the CO. The Contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

Once the workplan has been approved, the WAM and the Contractor shall convene one teleconference call meeting to discuss expectations and deliverable deadlines prior to the initiation of work.

Task 2: Best Practices in Data QA/QC Document

- **Update Word Version of Draft**

Contractor shall provide support to the WAM to update and organize the draft document in a logical fashion that best showcases SmartWay best practices in freight transportation data quality. Contractor shall then edit the draft document and add content as directed by the WAM through written technical direction.

A draft shall be submitted to the WAM to solicit comments and feedback, and the Contractor shall address them, generating a new final draft in Word. After edits are completed, the Contractor shall double check to make sure all changes were incorporated correctly and provide a final draft for EPA review. After approval of the final draft, the Contractor shall obtain the WAM's approval to proceed to layout.

- **Create Graphic Template**

The Contractor shall design a graphic "look and feel" for the guidance document that is similar to NCDC's DERA Report to Congress (EPA-420-R-12-031). The Contractor shall present two options for a cover design and interior spreads. The Contractor shall develop these options in close consultation with the WAM. Where possible, EPA will share original files and graphics for inclusion in the draft.

Throughout this design process, the Contractor shall solicit and incorporate comments from EPA. The Contractor shall also develop a system to track tables, figures, photos, and other graphic elements in the report.

- **Merge Text and Graphics**

The Contractor shall lay out the document for WAM approval. The draft document will include colorful graphics and utilize the branded look that can be incorporated into future SmartWay creative materials. The Contractor shall check the document for accuracy and perform editorial quality assurance procedures on all graphics.

ERG shall generate a draft version in .pdf format for EPA approval.

- **Finalize Guidance**

The WAM will approve the revised draft once EPA product review has concluded and the Contractor has made all edits as directed by the WAM through written technical direction. The Contractor shall then review the draft to correct any typos, spacing errors, mistakes, and inconsistencies to make the document "printer ready."

The Contractor shall then work with the WAM to make sure corrections are incorporated into the final draft. The Contractor shall also review the document to make sure color, composition, and graphic elements are consistent and optimized to enhance the document's readability.

EPA will review the "printer ready" .pdf version of the document for approval. The Contractor shall prepare a print package and work with the selected printer to resolve design and graphic questions and approve blueines prior to printing. See Section VI. of this document for details on the number of copies to be procured. The Contractor shall provide guidance on paper and ink choice upon request. Finally, the Contractor shall also provide a .pdf "508 compliant" so it may be posted on EPA's Web pages and adhere to accessibility guidelines

Task 3: Climate-based Partnership Program Data QA/QC Practices

- **Collect, compile and analyze data on existing climate-based voluntary partnership program data QA/QC efforts**

The Contractor shall gather, organize and succinctly portray current information on existing climate-based voluntary partnership program ("Program") efforts in the U.S. and worldwide to ensure the integrity of the information they gather from partners. Although it is unknown how many climate-based voluntary partnership programs exist, this collection could include up to twenty (20) Programs. Information to collect includes:

1. Name of the Program;
2. Geographic coverage of the Program;
3. Program Management Contacts: the names, addresses, phone numbers, email addresses of the government (or private) organization, and primary point of contact information (e.g., program manager) overseeing the Program;
4. Program Website URL;
5. General overview of the Program including the economic sector(s) addressed and industries represented in the program;
6. Number of partners participating in the Program in the Program's inauguration year;
7. Number of partners participating in the Program in the latest reporting year (including the percent coverage of the targeted industry);
8. Programmatic accomplishments, such as annual and cumulative greenhouse gas savings;
9. Targeted emissions savings, in addition to greenhouse gas emission, identified by the Program (annual and cumulative);

10. Details on the methodology used by the Program to assess environmental progress (e.g., programmatic emissions savings vs. non-participants in the industry (i.e., business as usual)
11. Detailed process/strategies used to ensure data integrity of the information collected by partners in the Program. This could include internal quality checks, if any, of any reporting mechanism, audits performed (internally and/or externally), etc.;
12. Annual government expenditures to operate the Program and, if not funded by a governmental organization, information on how the Program is funded; and,
13. Results of any third-party QA/QC reviews of the Program.

If the Contractor is unable to obtain certain data specified above, the Contractor is to contact the WAM to determine whether the information is necessary to the work assignment. If so, the WAM and Contractor will discuss and decide on the most efficient manner in which to obtain the data.

- **Data Organization and Presentation**

The Contractor shall provide the information to EPA in electronic format and recommend ways to incorporate this information on the EPA's SmartWay website.

Task 4: Project Reporting Monthly Status Report

The Contractor shall deliver bi-weekly work assignment status reports which shall track the progress on each of the tasks/deliverables. The report shall include the information such as task and subtask names, hours spent, contact information, task start date and deadlines, deliverables, accomplishments, and work on hold status. PO and WAM will notify the Contractor in writing regarding any changes to the report format. The WAM and Contractor project manager shall teleconference weekly to discuss progress on the projects and any issues that need resolution.

When expenditures for this work assignment reach 75% of approved LOE or funding, the Contractor shall notify the Contracting Officer, the Project Officer and WAM via email with this information.

End of Project Period Status Report

At the end of the project period, the Contractor shall provide a status report, either as one of the bi-weekly reports described above or as a separate report that breaks out costs by task.

IV. DELIVERY SCHEDULE AND MILESTONES

The Contractor shall complete deliverables in accordance with the schedule below.

<u>Task</u>	<u>Milestone/Deliverable</u>	<u>Date</u>
1	Draft Workplan and Kickoff Meeting	Workplan submitted per Contract requirements and kickoff meeting within 2 weeks of receipt of PWS
	Work assignment management meetings	Weekly
2	Best Practices in Data QA/QC Document	
	Update Word Version of Draft Guidance	Within 2 weeks of Workplan approval
	Create Graphic Templates	Within 1 week of receiving any completed section of the draft guidance
	Merge Text and Graphics into one document	Within 1 week of receiving the approved Word document text from EPA
	Finalize Guidance and deliver to EPA	Within 1 week of merging the text and graphics
3	Climate-based Partnership Program Practices	
	<ol style="list-style-type: none">1. Data compilation submitted electronically to EPA WAM in standalone written product designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Word)2. Debrief teleconference call in which Contractor provides a review of the information gathered in Task 2, discusses any issues or problems in gathering complete information if applicable, and discusses next steps for presenting information gathered. This would include a discussion of how best to use the information gathered under Task 2 on EPA's SmartWay website.	Within 6 weeks of Workplan approval
	Submit materials gathered from Task 3 to WAM for approval.	Within 2 weeks of WAM approval

VI. DISTRIBUTION AND FORMAT OF DELIVERABLES

All deliverables, including status reports between the Contractor and the Government, shall be delivered as follows:

- Best Practices in Data QA/QC Document1 copy of a .pdf 508-compliant document via email
- 25 copies in CD-ROM format to include graphical cover that looks like the cover of the final document
- 50 hard-copies of the guidance document

Climate-based Partnership Program Practices

- One copy in electronic format to the WAM and PO

The following applies to all tasks under this effort unless otherwise specified by the WAM during the performance of that task.

The Contractor shall deliver all draft and final reports, briefing materials and minutes, data sets, etc. in electronic format (HTML, Visio, Microsoft Word, Acrobat, etc. as appropriate) via electronic mail.

The Contractor shall submit a Letter of Transmittal with each deliverable, unless otherwise noted, which includes, at a minimum: the task/deliverable identified, type (draft or final), due date, submission date, deliverable name, and name of the WAM.

Inspection and Acceptance Criteria

The WAM will review deliverables for technical content, completeness, and grammar. Final inspection, testing and acceptance of all reports, code, and other deliverables will be performed by the WAM.

Other Requirements

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-07 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name								
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/01/2012 To 08/31/2013								
Comments:										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:				LOE:				
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:				LOE:				
Cumulative Approved:		Cost/Fee:				LOE:				
Work Assignment Manager Name Denise Kearns						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number 734-214-4240				
						FAX Number:				
Project Officer Name Joie Middlebrook						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number: 734-214-4934				
						FAX Number:				
Other Agency Official Name						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number:				
						FAX Number:				
Contracting Official Name Angela Lower						Branch/Mail Code:				
_____ (Signature)						_____ (Date)				
						Phone Number: 513-487-2036				
						FAX Number:				

Performance Work Statement (PWS)**Title:** EPA SmartWay Video Development & Production**Contractor:** Eastern Research Group**Contract No.:** EP-C-11-046**Work Assignment No.:** WA 1-07

Work Assignment Manager (WAM): Denise Kearns
2000 Traverwood Drive
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Alternate WAM: Patrice Thornton
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Project Officer (PO): Joie Middlebrook
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Contracting Officer (CO): Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

Period of Performance: September 1, 2012 to August 31, 2013

Background

SmartWay is a public/private partnership between the U.S. EPA and freight industry. The goal of the program is to facilitate collaboration and provide industry with tools and information that will support company efforts to protect the environment, improve energy efficiency, lower fuel costs and increase productivity. Over 3,000 companies participate in the partnership, including large Fortune 500 companies (retail shippers, national truck companies and rail carriers), medium and small trucking companies, logistics management companies and trade associations, among other organizations.

To achieve its goals the EPA SmartWay program reaches out to existing and potential partners, and other stakeholders through a broad range of activities, including web-based communications, industry trade journals, conference participation, partner-sponsored workshops and meetings, public service campaigns, and similar media.

SmartWay currently uses two videos to support its communications. These videos were developed approximately six years ago and need to be updated. One of the "old" videos is

11 minutes and the other is just over one minute in length. The one-minute video was extracted and created from the content of the 11-minute video. A DVD with these videos was provided to the contractor with WA 0-07 in the Base Period of this contract.

Through this WA to, EPA seeks to:

1. create at least one, and possibly two new videos with support from the contractor.

SmartWay Marketing Video (video 1)

One of the two new videos shall be developed to update the existing one-minute video so that it incorporates basic EPA video standards, such as a graphic open and close that use the EPA seal and a video title, captions for 508 compliance, and other standards (EPA video standards guidance document is attached to this amended PWS).

In addition, b-roll footage used in the updated video will include the use of aerodynamic trucks, and intermodal activities (train to truck, ports and a broader range of freight-related movement). Interviews with existing, leading SmartWay partners and affiliates will also be included in the updated video.

Based on these changes, EPA expects that the new video may run up to 2 ½ minutes in length, but no longer.

Similar to the old one-minute video, the primary purpose of the updated video will be to introduce EPA's SmartWay program to viewers. Another key purpose will be to encourage viewers to join the partnership.

The primary audience for the updated video includes potential partners, specifically large shippers (representing retail, manufacturing and related sectors), large private fleets, and large-medium size for-hire private carriers, including trucking fleets and train companies. This audience will have an interest in improving the efficiency of their freight operations and sustainability in the transportation industry.

Other audiences for this video include the general public, nongovernment organizations, policymakers and individuals with an interest in improving the efficiency (economic, environmental and energy) of moving freight.

This updated video will be posted to the SmartWay website, and also used for marketing meetings with potential partners and in industry conference presentations. In addition, it will be posted to EPA social media sites, including You Tube.

Footage from the old videos is not available for use, but EPA will provide some current, original footage for use in the updated videos. Under this PWS, the Contractor is tasked with providing support to develop new original footage for use in the videos. This new footage shall primarily consist of some b-roll and partner interviews.

The Contractor may also assist EPA in identifying original and stock footage that is necessary (iStock photo, video block, etc.) for use in the videos; EPA will be responsible for purchasing the stock footage.

SmartWay Shipper Video (video 2)

As proposed in the original PWS, EPA seeks to create a short video highlighting the goals of its SmartWay shipper program and the benefits of participating in that element of the partnership. The primary purpose of this product is to encourage shippers to join the partnership and work proactively with their carriers to move goods more sustainably.

In developing its workplan, the Contractor shall consider the option of either developing a video, or alternatively a photo slideshow, that would include some video, photos, animation, music and sound bites. The workplan shall provide cost estimates for both these options.

Regardless of whether a video or photo slideshow is developed, the audience for the end product is predominantly large Fortune 1000 shippers that use carrier services (private or for-hire, truck and rail) to move freight.

Other secondary audiences include carriers (truck and rail), logistics management companies, non-governmental organizations, consumers, policymakers and individuals interested in improving the efficiency (economic, environmental and energy) of moving freight.

EPA has some existing photos that could be used for a photo slideshow, and expects that some of the B-roll (stock or original) captured for the SmartWay marketing video would be used for the shipper video as well. The Contractor will work with EPA to identify photos, video footage, sound bites, music and other visual aids needed for the video or the slideshow, depending on the option chosen.

Project Tasks for SmartWay video development and production

Task 1: Prepare Work Plan (WP)

The contractor shall submit the work plan in accordance with the contract.

Task 2: Planning & pre-production

Final working drafts of script, storyboard and interviewee question & answer document completed during the Base Period of Performance:

- Options for motion graphics presented August 17 (under Base Period).
- I-stock videos for use in video identified August 17 (under Base Period).

Under this WA, in preparation for a rough cut of the video, EPA and the Contractor shall discuss via teleconference (up to 3 teleconferences, no longer than 1 hour each) any refinements needed for the script and storyboard. These refinements shall be necessary based on any adjustments needed as a result of interviews recorded under Task 3; any additional images captured from existing footage and as part of b-roll shoot; and the motion graphics selected for the video.

TASK 2		
DATE DUE	DELIVERABLE	COMMENTS
September 7	- Refinements to final working drafts of video script and storyboard	

Task 3: Perform the video taping

In this task the Contractor shall setup, conduct and tape interviews using two or more HD-XDCAM cameras so that more than one angle of the interviewee is captured. EPA estimates that up to three interviews shall be taped and that local travel may be required. EPA will identify SmartWay partner and affiliate representatives who can be interviewed in local proximity to ERG offices (DC-MD-VA-WV metropolitan area). A green screen shall be used as a backdrop for the interviews. If available, an EPA representative designated by the WAM may accompany ERG to the interview and b-roll shoot/s.

It may be that EPA is unable to identify a suitable SmartWay partner or affiliate representative in the DC-MD-VA-WV metropolitan area. If it is necessary to interview a SmartWay partner or affiliate representative outside the DC-MD-VA-WV area, the Contractor shall explore and identify the most cost effective approach to interviewing the candidate EPA identifies for the interview.

EPA expects that at least one ERG representative with professional experience in conducting taped interviews for broadcast purposes may need to travel. In addition to conducting the taped interview, the ERG representative also may guide a trained videographer in shooting some B-roll for use in the SmartWay video. Travel shall be for one overnight, and a full day of video shooting.

One of the interviews may also involve additional taping of B-roll footage that could be used for the video as well (if the interview is conducted at a place where trucks are moving goods). This B-roll shall involve footage of a truck and related transportation activities.

To conduct this task ERG shall provide support to EPA to:

- Prepare and setup for videotaping, using HD cameras (tape dimensions shall be 1920x1080 and shot in a Pro Res format), lighting and audio equipment
- Conduct interviews

- Provide raw footage in Final Cut Pro format on electronic media (disk or hard drive, if necessary)

Schedule for Task 3

Contractor shall begin work on Task 3 following EPA approval of final script and storyboard in Task 2. EPA will provide the Contractor with a list of interviewees, appointment times and locations for the videotaping. All interviews shall be completed within two weeks of receiving the EPA WAM's approval on the final script and storyboard from Task 2.

TASK 3		
DATE DUE	DELIVERABLE	COMMENTS
September 4-15	- Interviews & b-roll shoot conducted	

Task 4: Post-production Editing and Mastering

In this task, the Contractor shall convert the raw video footage of interviews to a low resolution electronic file with a time code so that EPA can view the footage online. The file shall include directories with descriptions so that EPA can easily search and locate the interview and b-roll footage. For example, each interview should be assigned a directory and marked according to the interviewee name.

The Contractor also shall provide support to EPA to create an edit list from the interviews and b-roll. Specifically, when compiling the interview and media files for EPA to review, the Contractor also shall take time during that process to identify segments that may be used in the final SmartWay marketing and shipper video products.

Upon completing its review of raw footage and any recommendations from the Contractor, EPA will provide the Contractor with specific time-coded video footage to be considered for the final SmartWay marketing and shipper video products.

EPA also will provide the Contractor with the stock footage selected in Task 2 for use in the final video.

Based on the script and storyboard created in Task 2 and using final edit list, and other footage (original or stock), the Contractor shall develop:

- One short SmartWay marketing video (1-2:30 minutes)
- One short SmartWay shipper video or photo slideshow (1-2:00 minutes) that uses graphics similar to and shares the look and feel of the short SmartWay marketing video
- All videos must adhere to EPA web standards, and shall be transcribed and close-captioned so that they are 508 compliant

- The videos shall be provided on electronic media (disk or hard drive, if necessary) in MPEG-4 Part 14 format (for uploading to web) and in WMV format (for computer viewing), and
- Contractor shall provide support to EPA in identifying format sizing for video use in presentations.

In addition to these finished products the Contractor also shall provide EPA with a master copy of the media containing original interviewee footage, b-roll and any another audio or visual material used to produce the final video products described in this PWS. The master copy shall include the original footage in Final Cut Pro format and in a wmv or mpeg format so the footage may be viewed in the future with the use of standard, no-cost software.

Schedule for Task 4

Contractor shall begin work on Task 4 immediately upon completing the interviews and b-roll shoot. The raw interview and b-roll footage shall be posted in a low-resolution, time coded format to a website where EPA can view it one week after the shoot.

EPA and the Contractor shall compile an edit list within one week after the time-coded footage has been made available.

One week later, the Contractor shall develop and submit rough cuts of the video products described in this task. The EPA WAM will provide comments on rough cuts of video products within one week of receiving them. Upon receiving EPA's comments on the rough cuts, the Contractor shall have an additional week to make changes and submit again to EPA for final review. EPA shall provide final comments within one week following that. Upon receiving and incorporating EPA final comments, the Contractor shall complete and submit final videos to EPA within one week. The master copy of all materials (on an external hard disk) shall be provided at the same time.

TASK 4		
DATE DUE	DELIVERABLE	COMMENTS
Sept 17	Time coded raw footage posted	
Sept 20	Edit list prepared	
Sept 24	1st draft video	
Sept 26	EPA comments on 1st draft	
Oct 1	2nd draft video	
Oct 3	EPA comments on 2nd draft	
Oct 17	Final video complete & master copy of all materials due	

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-07								
		<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name								
Specify Section and paragraph of Contract SOW										
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/01/2012 To 08/31/2013								
Comments:										
<div style="display: flex; justify-content: space-between;"> <input type="checkbox"/> Superfund <div style="text-align: center;">Accounting and Appropriations Data</div> <input checked="" type="checkbox"/> Non-Superfund </div>										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO <input type="checkbox"/> (Max 2)										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:		LOE:						
Cumulative Approved:		Cost/Fee:		LOE:						
Work Assignment Manager Name Denise Kearns <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div>(Signature)</div> <div>(Date)</div> </div>						Branch/Mail Code: Phone Number 734-214-4240 FAX Number:				
Project Officer Name Joie Middlebrook <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div>(Signature)</div> <div>(Date)</div> </div>						Branch/Mail Code: Phone Number: 734-214-4934 FAX Number:				
Other Agency Official Name <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div>(Signature)</div> <div>(Date)</div> </div>						Branch/Mail Code: Phone Number: FAX Number:				
Contracting Official Name Angela Lower <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>_____</div> <div>_____</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div>(Signature)</div> <div>(Date)</div> </div>						Branch/Mail Code: Phone Number: 513-487-2036 FAX Number:				

Performance Work Statement (PWS)**Title:** EPA SmartWay Video Development & Production**Contractor:** Eastern Research Group**Contract No.:** EP-C-11-046**Work Assignment No.:** WA 1-07, Amendment 1

Work Assignment Manager (WAM): Denise Kearns
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Project Officer (PO): Joie Middlebrook
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Contracting Officer (CO): Angela Lower
Phone: 513-487-2036
Email: lower.angela@epa.gov

Period of Performance: September 1, 2012 to August 31, 2013

Background

SmartWay is a public/private partnership between the U.S. EPA and freight industry. The goal of the program is to facilitate collaboration and provide industry with tools and information that will support company efforts to protect the environment, improve energy efficiency, lower fuel costs and increase productivity. Over 3,000 companies participate in the partnership, including large Fortune 500 companies (retail shippers, national truck companies and rail carriers), medium and small trucking companies, logistics management companies and trade associations, among other organizations.

To achieve its goals the EPA SmartWay program reaches out to existing and potential partners, and other stakeholders through a broad range of activities, including web-based communications, industry trade journals, conference participation, partner-sponsored workshops and meetings, public service campaigns, and similar media.

SmartWay currently uses two videos to support its communications. These videos were developed approximately six years ago and need to be updated. One of the "old" videos is

11 minutes and the other is just over one minute in length. The one-minute video was extracted and created from the content of the 11-minute video. A DVD with these videos was provided to the contractor with WA 0-07 in the Base Period of this contract.

Under WA 0-07 and WA 1-07 work was begun to update the one-minute video. On December 14, 2012, the Contractor provided EPA with a rough cut of an updated SmartWay marketing video.

Through this amendment to the PWS, the Contractor shall submit all raw files reviewed and used by the Contractor for developing the rough cut of the video. These files include: original files that EPA and its SmartWay partners provided to the Contractor; files converted by the Contractor to professional quality format for production purposes; files converted by the Contractor to a low resolution format; interview files created by the Contractor; graphic files created by the Contractor; still images; and any other files relevant to the video. These files shall be uploaded to an external hard drive that has been formatted to work in both a MacIntosh and PC environment with a disk speed of 5400rpm.

The Contractor also shall provide EPA with the soundtrack purchased for the purposes of creating the video, an audio file of the voice over options recorded for the video and any other files needed for EPA to complete the video.

EPA is requesting these files because the Agency plans to complete the SmartWay video started under this work assignment in house, instead of completing the video with the Contractor. This work assignment will be considered closed, once EPA receives the video, audio and other related digital files provided to and developed by the Contractor for the purposes of creating the 1-2 minute SmartWay video under this WA.

Project Tasks for SmartWay video development and production

Task 1: Prepare Work Plan (WP)

The contractor shall submit a work plan for this amended work statement in accordance with the contract.

Task 2: Planning & pre-production

Working drafts of the video script, storyboard and interviewee question & answer documents were completed during the Base Period of Performance. In addition, during the Base Period of Performance, the Contractor presented options for motion graphics and identified I-stock videos to use in video.

Under Option Period 1, in preparation for a rough cut of the video, EPA and the Contractor discussed via teleconference a number of refinements to the video script and storyboard. Based on these discussions, a final working draft of the script was completed.

Also during Option Period 1, EPA and the Contractor secured approximately 8 hours of b-roll from EPA's SmartWay partners and other sources. Specifically, b-roll was provided as follows:

B-ROLL FILES

Diesel Technology Forum (DTF): mostly conference footage with some truck and technology equipment (external hard drive)

Schneider: mostly truck and train, some intermodal activity (2 DVDs)

C.R.England: truck shots with great environmental background/scenery (External hard drive)

CSX: train shots with great environmental background/scenery (Box Drop)

Port of Baltimore: port activity (Box Drop)

EPA Freight Sustainability Summit (EPA): all conference footage (External hard drive)

VIDEO FILES

EPA seal and lower third video graphics (FTP site)

Under Option Period 1, the Contractor converted some of this b-roll into a low resolution format so that it could be viewed by EPA, and into a format so that the b-roll could be used for the production of a high definition, professional video. The contractor also created logs with brief descriptions of the b-roll.

The Contractor and EPA reviewed this video b-roll and EPA identified a number # segments to be used in the video.

Under this amendment, the Contractor shall provide on a hard drive (formatted for both a Mac and PC environment and with a disk speed of 5400rpm) the raw and original footage, and reformatted footage of all files, and the graphic files created by the Contractor. It also shall provide all video logs it created to document and describe the b-roll video.

TASK 2		
DATE DUE	DELIVERABLE	COMMENTS
January 10	External hard drive containing raw and converted b-roll footage; graphics; photographs	Deliverable due date same for Tasks 3 and 4 Use same hard drive for Task 2, 3 and 4 files Hard drive needs to be formatted to work in both a Mac and PC environment with a disk speed of 5400rpm
January 10	Logs describing b-roll footage	

Task 3: Perform the video taping

During the Base Period and Option Period 1 of this task, the Contractor conducted and taped three interviews, approximately 45 minutes each, with SmartWay partner representatives, using an HD-XDCAM camera with an aspect ration of 1920X1080. A green screen was used as a backdrop for the interviews. One of the interviews required travel for an overnight. With direction from EPA, the Contractor identified interview excerpts to be used in the final video project.

Under this amendment, the Contractor shall provide on an external hard drive (formatted for a Mac environment) the raw interview footage, including audio files, as well as the low resolution interview files created for viewing. The contractor also shall provide and identify in a separate file, the interview excerpts selected for use in the video. The interview files shall be organized and labeled by the interviewee's name.

TASK 3		
DATE DUE	DELIVERABLE	COMMENTS
January 10	External hard drive containing raw and converted interview files and interview excerpts	Deliverable due date same for Tasks 2 and 4 Use same hard drive for Task 2, 3 and 4 files Hard drive needs to be formatted for both a Mac and PC environment with a disk speed of 5400rpm

Task 4: Post-production Editing and Mastering

In this task, the contractor identified a sound track to use in the video, and recorded a voice over for the video using the script completed under Task 2. Using this sound track, the recorded voice over, and the video segments selected under Task 2 and the interview excerpts selected under Task 3, the Contractor completed a rough cut of a SmartWay video. The Contractor also incorporated into the video, graphics that it had created under Task 2.

Under this amendment, the Contractor shall provide on an external hard drive (formatted for a Mac environment), the master file of this rough cut of the video and a low resolution file of the rough cut that can be viewed on a personal computer. The Contractor also shall provide on the hard drive, the recorded voice over, including all options that were recorded. The sound track for the video also shall be provided.

Schedule for Task 4

TASK 4		
DATE DUE	DELIVERABLE	COMMENTS
January 10	External hard drive containing master file of video rough cut,	Deliverable due date same for Tasks 2 and 3

	low resolution copy of rough cut, recorded voice over (all options)	Use same hard drive for Task 2, 3 and 4 files Hard drive needs to be formatted for both a Mac and PC environment with a disk speed of 5400rpm
January 10	Audio soundtrack of music	

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-08 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046	Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1	Title of Work Assignment/SF Site Name Summary Presentation for 0-08								
Contractor EASTERN RESEARCH GROUP, INC.		Specify Section and paragraph of Contract SOW 1a, 1b								
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 10/04/2012 To 08/31/2013								
Comments:										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor W/P Dated:		Cost/Fee:		LOE:						
Cumulative Approved:		Cost/Fee:		LOE:						
Work Assignment Manager Name Patty Klavon <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number 734-214-4476 FAX Number:			
Project Officer Name Joie Middlebrook <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 734-214-4934 FAX Number:			
Other Agency Official Name Leila Cook <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 734-214-4820 FAX Number:			
Contracting Official Name Angela Lower <div style="display: flex; justify-content: space-between;"> <div>_____ (Signature)</div> <div>_____ (Date)</div> </div>							Branch/Mail Code: Phone Number: 513-487-2036 FAX Number:			

PERFORMANCE WORK STATEMENT

TITLE: Summary Presentation on ERG Report, "Model IM Program Characterization"

CONTRACTOR: Eastern Research Group

CONTRACT NUMBER: EP-C- 11-046

WORK ASSIGNMENT NUMBER: 1-08

WORK ASSIGNMENT MANAGER (WAM): Patty Klavon
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ALTERNATE WAM: Astrid Larsen
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PROJECT OFFICER (PO): Joie Middlebrook
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Phone: 734-214-4934
Fax: 734-214-4052
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CONTRACTING OFFICER (CO): Angela Lower
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Email: lower.angela@epa.gov

PERIOD OF PERFORMANCE: Effective Date to August 31, 2013

BACKGROUND AND OBJECTIVE

The Contractor has already produced the report, "Model IM Program Characterization," as part of Work Assignment # 0-08, EP-C-11-046. Under this work assignment, the Contractor is to summarize the Work Assignment 0-08 report's methodology and conclusions in a PowerPoint presentation aimed at explaining the report's methods and conclusions to EPA's OTAQ management (similar to an executive summary, but in slide format). To achieve this objective, this work assignment requires the following tasks:

Task 1: Prepare Work Plan

Contractor shall prepare a Work Plan for the Work Assignment as specified in the Contract. The Work Plan shall outline, describe and include the approach, resources, timeline, and due dates for deliverables, detailed cost estimate by task and a staffing plan. The Work Assignment Manager (WAM), the Project Officer (PO) and the Contracting Officer (CO) will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the Contractor by the CO. The Contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

Task 2: Develop a Summary Presentation for Final Report from Work Assignment #0-08

To help facilitate the discussion of the report's conclusions with EPA's OTAQ management, the Contractor shall produce a draft summary of the report produced under Work Assignment 0-08 including the methods and assumptions used, the results of the analyses performed, and any conclusions drawn. The draft summary shall be in the form of a PowerPoint presentation that can be presented in no more than 45 minutes and consisting of no more than twenty-five (25) slides.

The PowerPoint presentation shall include talking points in the Notes section of each PowerPoint slide. The purpose of the talking points is to expound on items presented in each slide and should help the presenter share key information with the targeted audience.

The Contractor shall deliver the draft presentation to the WAM during a teleconference call to be scheduled as appropriate. The Contractor shall make revisions to the presentation after no more than one round of comments from the EPA prior to submitting the final presentation to the WAM.

Deliverables/Timeline

Task #	Task Designation	Deliverables	Deliverable Timeline
1	Prepare Work Plan	Work Plan draft	Within 15 calendar days of receipt of Work Assignment
2	Summary Presentation Development	Develop and Deliver PowerPoint presentation summarizing the ERG WA 0-08 report	Within four (4) weeks of Work Plan approval
2	Presentation Briefing	Deliver and discuss draft presentation to WAM via conference call for comment.	Within five (5) weeks of Work Plan approval
2	Final Summary Presentation	Final presentation submitted to WAM.	Within one (1) week after WAM provides comments on the draft presentation

REPORTING REQUIREMENTS

The Contractor shall prepare its work plan within 15 calendar days of receipt of a Work Assignment signed by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to their work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 2 days of its issuance. Technical Direction will be within the scope of the Performance Work Statement and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75 percent of the funds and/or hours for this work have been expended.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-09 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name IM Program Data Collection								
Specify Section and paragraph of Contract SOW A, B, C, D, E										
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 10/26/2012 To 08/31/2013								
Comments:										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
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4										
5										
Authorized Work Assignment Ceiling										
Contract Period:		Cost/Fee:		LOE:						
09/19/2011 To 08/31/2013										
This Action:										
Total:										
Work Plan / Cost Estimate Approvals										
Contractor WP Dated:		Cost/Fee:		LOE:						
Cumulative Approved:		Cost/Fee:		LOE:						
Work Assignment Manager Name Patty Klavon							Branch/Mail Code:			
_____ (Signature)							_____ (Date)			
Project Officer Name Joie Middlebrook							Phone Number 734-214-4476			
_____ (Signature)							_____ (Date)			
Other Agency Official Name Leila Cook							FAX Number:			
_____ (Signature)							_____ (Date)			
Contracting Official Name Angela Lower							Branch/Mail Code:			
_____ (Signature)							_____ (Date)			
							Phone Number 513-487-2036			
							FAX Number:			

PERFORMANCE WORK STATEMENT

Title: I/M Program Data, Cost and Design Information

Contractor and Contract Number: Eastern Research Group
EP-C-11-046

Work Assignment Number: 1-09

Work Assignment Manager (WAM): Patty Klavon
2000 Traverwood Drive
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Project Officer (PO): Joie Middlebrook
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Fax: 734-214-4052
Email: middlebrook.joie@epa.gov

Contracting Officer: Angela Lower
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Fax: 513-487-2109
Email: lower.angela@epa.gov

PERIOD OF PERFORMANCE: Effective Date to August 31, 2013

I. BACKGROUND

Current information on Inspections and Maintenance (I/M) programs throughout the country continues to be in high demand from policy makers and will be essential if EPA strengthens the national ambient air quality standard (NAAQS) for ground-level ozone and new I/M areas are required. The data that needs to be assembled includes basic information on the specific geographic areas that are currently doing I/M (down to the county and/or partial county level), the coverage and types of testing done in these programs, and key contacts in the managing agencies. This work will also update data on the cost of inspections in I/M programs to assess the national cost and the range of costs of inspection, as well as average repair costs for a range of geographic regions. Additional data will be collected and analyzed on the number of vehicles tested, number of vehicles that fail, the nature of failures, retest information and the number of initially failed vehicles with no known final outcome.

II. CONTRACT LEVEL STATEMENT OF WORK REFERENCE

The tasks to be performed under this work assignment are consistent with the work authorized under Task 3. Program and Emissions Analyses of the contract's performance work statement

III. OBJECTIVE

The primary objective of this work assignment is to continue work assignment tasks unfinished from work assignment 0-09, EP-C-11-046. Gather, compile and analyze current information about existing I/M programs across the country to provide air agencies and other policy makers in existing and potentially new I/M areas with current information on I/M programs so as to support program design and implementation. Currently the contractor is in possession of the information gathered from WA 0-09, EP-C-11-046.

To achieve this objective, this work assignment requires the following tasks:

Task 1: Work Plan Preparation

The Contractor shall develop a Work Plan, in accordance with the terms and conditions of contract clause B.2 entitled "Work Assignments.". The work plan shall include a detailed technical and staffing plan and a detailed cost estimate.

Task 2: Data Organization and Presentation

The Contractor shall provide the OBD Clearinghouse with the information gathered from completed work under Work Assignment 0-09, EP-C-11-046, after review and approval from the EPA WAM and work with the OBD Clearinghouse to ensure that the information is presented on the OBD Clearinghouse website in the most useful and accessible fashion, while meeting EPA requirements for postings to the web. The Contractor shall also provide this information to EPA in electronic format and recommend ways to incorporate the information into EPA's website.

Additionally, the Contractor shall provide a memo to the EPA briefly describing how the following factors were considered in compiling the information gathered under Work Assignment 0-09, EP-C-11-046:

- Soundness and applicability
- Utility
- Clarity/Completeness
- Uncertainty/Variability

- Evaluation/Review

End of Project Period Status Report

At the end of the project period, the Contractor shall provide a status report, either as one of the monthly reports described above or as a separate report that breaks out costs by task.

IV. DELIVERY SCHEDULE AND MILESTONES

The Contractor shall complete deliverables in accordance with the schedule below.

<u>Task</u>	<u>Milestone/Deliverable</u>	<u>Date</u>
1	1. Proposed work plan	2 weeks after receipt
2		
3	1. Submit materials gathered from Work Assignment 0-09, EP-C-11-046 to WAM for approval 2. Revise materials gathered from Work Assignment 0-09, EP-C-11-046 as needed, per WAM review. 3. Submit materials gathered from Work Assignment 0-09, EP-C-11-046 to OBD Clearinghouse and work with OBD Clearinghouse to ensure that material is posted in a useful/accessible fashion. 4. Provide EPA with suggestions for incorporating the data gathered under Work Assignment 0-09, EP-C-11-046 on EPA's website. 5. Submit memo to EPA briefly explaining how the factors outlined in Task 2 were considered in collecting the data for Work Assignment 0-09, EP-C-11-046	Within 3 weeks of completion of Task 1 Within 1 week of WAM approval Within 1 week of WAM approval

VI. DISTRIBUTION AND FORMAT OF DELIVERABLES

All deliverables, including status reports between the Contractor and the Government, shall be delivered as follows:

One copy in electronic format to the WAM and PO

The following applies to all tasks under this effort unless otherwise specified by the WAM during the performance of that task.

The Contractor shall deliver all draft and final reports, briefing materials and minutes, data sets, etc. in electronic format (HTML, Visio, Microsoft Word, Acrobat, etc. as appropriate) via electronic mail.

The Contractor shall submit a Letter of Transmittal with each deliverable, unless otherwise noted, which includes, at a minimum: the task/deliverable identified, type (draft or final), due date, submission date, deliverable name, and name of the WAM.

Inspection and Acceptance Criteria

The WAM will review deliverables for technical content, completeness, and grammar. Final inspection, testing and acceptance of all reports, code, and other deliverables will be performed by the WAM.

Other Requirements

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-10 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2013 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name Diesel OBD in IM: Options								
Specify Section and paragraph of Contract SOW 1d, 3										
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/01/2012 To 08/31/2013								
Comments:										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
Note: To report additional accounting and appropriations data use EPA Form 1900-69A.										
SFO (Max 2) <input type="checkbox"/>										
Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
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Contractor WP Dated:				Cost/Fee:				LOE:		
Cumulative Approved:				Cost/Fee:				LOE:		
Work Assignment Manager Name Patty Klavon							Branch/Mail Code:			
_____ (Signature) _____ (Date)							Phone Number 734-214-4476			
							FAX Number:			
Project Officer Name Joie Middlebrook							Branch/Mail Code:			
_____ (Signature) _____ (Date)							Phone Number: 734-214-4934			
							FAX Number:			
Other Agency Official Name							Branch/Mail Code:			
_____ (Signature) _____ (Date)							Phone Number:			
							FAX Number:			
Contracting Official Name Angela Lower							Branch/Mail Code:			
_____ (Signature) _____ (Date)							Phone Number: 513-487-2036			
							FAX Number:			

PERFORMANCE WORK STATEMENT

TITLE: Diesel Onboard Diagnostic (OBD) Readiness in an Inspection and Maintenance (I/M)
Setting: Options Development

CONTRACTOR: Eastern Research Group

CONTRACT NUMBER: EP-C- 11-046

WORK ASSIGNMENT NUMBER: 1-10

WORK ASSIGNMENT MANAGER (WAM): Patty Klavon
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CONTRACTING OFFICER (CO): Angela Lower
Phone: 513-487-2036
Fax: 513-487-2107
Email: lower.angela@epa.gov

PERIOD OF PERFORMANCE: Effective Date to August 31, 2013

BACKGROUND AND OBJECTIVE

(NOTE: This work is a follow-on work assignment for WA 0-10)

Although not required to test diesel-fueled vehicles under current, Federal vehicle inspection and maintenance (I/M) requirements, several states have sought EPA's assistance in developing

options for testing such vehicles. Therefore, the purpose of this ~~w~~Work ~~a~~Assignment is to convene a workgroup composed of representatives from the I/M community and vehicle manufacturers to discuss issues associated with the testing of light- and medium-duty diesel vehicles (up to and including 14,000 pounds Gross Vehicle Weight Rating) equipped with onboard diagnostic (OBD) systems. The aim of this discussion will be to develop recommendations regarding how best to test these vehicles under an I/M-like program with particular focus on how to address the setting of monitor readiness, the prevention of unnecessary motorist inconvenience, and the detection of any possible owner fraud. The Contractor shall contribute its technical knowledge to develop the issue and options while also assessing the implications of potential government policies on the vehicle manufacturing and testing communities.

The primary objective of this ~~w~~Work ~~a~~Assignment is to provide air agencies and other policy makers in existing and potentially new I/M areas with options for conducting OBD-based inspections of light- to medium-duty diesel vehicles in a way that minimizes customer inconvenience while supporting state-to-state consistency for those program areas opting to test these vehicles.

This ~~w~~Work ~~a~~Assignment is a continuation of WA 0-10 and incorporates all work performed under that ~~w~~Work ~~a~~Assignment. To achieve this objective, this ~~w~~Work ~~a~~Assignment requires the following tasks:

Task 1 - Prepare Work Plan

Contractor shall prepare a Work Plan for the Work Assignment as specified in the contract. The Work Plan shall outline, describe and include the approach, resources, timeline and due dates for deliverables, detailed cost estimate by task and a staffing plan. The Work Assignment Manager (WAM), the Project Officer (PO) and the Contracting Officer (CO) will review the Work Plan. However, only the CO can approve/disapprove, suggest revisions, or change the Work Plan. Official revisions will be given to the Contractor by the CO. The Contractor shall prepare a revised Work Plan incorporating the CO's comments, if required.

Task 2: Workgroup Facilitation

To facilitate the discussion of the diesel I/M related issues described above, the ~~e~~Contractor shall convene a group of experts selected by the EPA in a series of 2-4 conference calls. The teleconference calls shall all have taken place by September 21, 2012. The Contractor shall coordinate the development of a proposed timeline for these calls with the workgroup. Workgroup facilitation shall include the establishment of a call-in number with sufficient teleconference lines to accommodate all participants, the scheduling of calls, the development and/or solicitation of agenda items, and the taking and dissemination of minutes to workgroup members and the EPA WAM.

The Contractor shall take the lead on the discussion, ensuring that all parties are given an opportunity to present their positions and to respond to questions, objections, etc. The Contractor shall work with the workgroup to develop options for addressing the technical implementation issues identified, complete with pros and cons. The Contractor shall include in

the options development an assessment of the economic and environmental implications of each of the options.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to determining EPA policy and preparation of documents on EPA letterhead.

The Contractor shall debrief the WAM after each workgroup meeting via teleconference call to be scheduled as appropriate

Task 3: Technical Report and Information Summary

The Contractor shall produce a separate stand alone written report that identifies the issues discussed, the options investigated, the pros and cons for each option (including an assessment of the implications of prospective options on the stakeholder community), and recommendations. The timeline for conducting the calls, completing the technical report and information summary shall include the production of a working draft for the workgroup's comments.

A draft and final report shall be submitted to the EPA WAM for review, comment, and acceptance. Submission of the draft report to EPA will be followed by a briefing on the main issues and options discussed prior to the Contractor's receiving EPA's comments.

Concurrent with the final report, the Contractor shall draft an information summary directed toward the stakeholder community which will summarize options for addressing the technical implementation issues identified, along with the pros and cons outlined in the technical report.

Deliverables/Timeline

Task #	Task Designation	Deliverables	Deliverable Deadline
1	Prepare Workplan	First Draft of Work Plan	2 weeks after receipt
2	Group Facilitation	A schedule of 2-4 conference calls, including agendas, meeting minutes, and a debrief of the WAM after each call.	Last call no later than 9/21/12
3	Technical Report and Information Summary	Draft technical report to workgroup for comment.	9/28/12
		Draft technical report to WAM for review.	10/15/12
		Final report and draft Information Summary submitted to WAM.	10/22/12
		Final draft Information Summary submitted to WAM	11/1/12

REPORTING REQUIREMENTS

The Contractor shall prepare its ~~w~~Work ~~p~~Plan within 15 days of receipt of a Work Assignment by the Contracting Officer. The WAM, PO, and the CO shall review the work plan. Official revisions, if necessary, shall be given to the CO. The Contractor shall make revisions to its work plan, incorporating the CO's comments, if necessary.

All documentation shall be in accordance with contract specifications. In addition, the Contractor shall make available to the EPA all information gathered, reports, and other project-related documents, with incorporated or embedded graphics, if applicable, in both printed and electronic format. The Contractor shall deliver the draft and final documents in a format designed to run on standard Windows-based computer using commonly used software (e.g., Microsoft Office).

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the CO on the work assignment. Any technical direction or "guidance" provided to the Contractor, if issued orally, must be confirmed in writing within two (2) days of its issuance. Technical direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75% of the funds and/or hours of for this work assignment have been expended.

EPAUnited States Environmental Protection Agency
Washington, DC 20460**Work Assignment**

Work Assignment Number

1-11

☐ Other☐ Amendment Number:

Contract Number

EP-C-11-046

Contract Period 09/19/2011 To 08/31/2013

Base

Option Period Number 1

Title of Work Assignment/SF Site Name

DERA helpline

Contractor

EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW

1A and 1C

Purpose:



Work Assignment



Work Assignment Close-Out



Work Assignment Amendment



Incremental Funding



Work Plan Approval

Period of Performance

From 09/01/2012 To 08/31/2013

Comments:

Diesel Emission Reduction Program helpline



Superfund

Accounting and Appropriations Data



Non-Superfund

SFO
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
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Authorized Work Assignment Ceiling

Contract Period:

09/19/2011 To 08/31/2013

Cost/Fee:

LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Sally Newstead

Branch/Mail Code:

Phone Number 734-214-4474

FAX Number: 734-214-4053

(Signature)

(Date)

Project Officer Name Joie Middlebrook

Branch/Mail Code:

Phone Number: 734-214-4934

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Angela Lower

Branch/Mail Code:

Phone Number: 513-487-2036

FAX Number:

(Signature)

(Date)

Performance Work Statement (PWS)

Contract Number: EP-C-11-046

Work Assignment: WA-1-11

1.01 TITLE

Diesel Emissions Reduction Program Helpline

2.0 WORK ASSIGNMENT MANAGER (WAM)

Sally Newstead (734)214-4474

Transportation and Climate Division

ALT. WORK ASSIGNMENT MANAGER

Jeffra Rockwell (734) 214-4401

Transportation and Climate Division

PROJECT OFFICER (PO)

Joie Middlebrook, (734)214-4934

Transportation and Climate Division

CONTRACT OFFICER (CO)

Angela Lower, (513) 487-2037

Cincinnati Procurement Operations Division (CPOD)

3.0 DURATION: Issuance through 8/31/2013

4.0 PURPOSE

The purpose of this work assignment is to have the contractor provide assistance to EPA's National Clean Diesel Campaign (NCDC) by operating a toll-free telephone helpline with two main tasks:

- 1) To answer general routine telephone questions about the Diesel Emissions Reduction Program (also known as DERA) through a menu system and call-backs; and
- 2) To provide technical and engineering support to clean diesel projects.

In addition, under this PWS the Contactor shall assist EPA to generate the materials necessary for the successful implementation of the Energy Policy Act (2005) Diesel Emission Reduction program. EPA requires the technical support of a Contractor to strengthen and enhance its outreach and implementation and technical support of specific projects.

5.0 BACKGROUND

For fiscal year 2008, Congress appropriated funds for the first time under the Energy Policy Act (2005) to help reduce harmful emissions from heavy-duty diesel engines. In FY2008, the total amount of funding available is \$49.2 million. In 2009 Congress appropriated \$300 million through the American Recovery and Reinvestment Act and \$60 million in FY09 funding for DERA. Funds were also appropriated for FY09/10, FY11 and FY12. Expectations are that they will again be appropriated through FY16. Through the NCDC, EPA will award grants to assist its eligible partners in building diesel emission reduction programs across the country that improve air quality and public health. The contractor shall support those projects by answering frequently asked programmatic questions and project-specific technical questions.

6.0 PERFORMANCE WORK STATEMENT

Under this PWS the Contractor shall assist EPA's NCDC by operating a toll-free telephone helpline and an email box with two main tasks:

- 1) To answer general routine questions about the Diesel Emissions Reduction program through a menu system and call-backs; and
- 2) To provide technical and engineering support to clean diesel projects.

The Contractor shall answer telephone and email inquiries regarding the Diesel Emissions Reduction Program (e.g., National Clean Diesel Funding Assistance Program, the State Clean Diesel Grant and Loan program, and the National Clean Diesel Emerging Technology program) in general as well as technical assistance questions related to diesel emission reduction technologies and strategies and EPA-funded projects.

The Contractor shall fulfill requests for materials daily and track all correspondence in the NCDC database.

In written discussion with the WAM, the Contractor shall establish an easy to navigate telephone menu of options for various topics. The Contractor shall update the outgoing message as necessary or when requested. The Contractor shall also respond to emails received from the NCDC website (CleanDiesel@epa.gov). The Contractor shall retrieve, log and act upon requests from the Information Request Line or via email. The Contractor shall provide quick, accurate, thorough, user-friendly responses to inquiries about NCDC or shall forward to EPA those inquiries requiring EPA expertise or official government responses.

In establishing the helpline, the Contractor shall develop, with written concurrence from the WAM, draft responses to frequently asked questions. The Contractor shall develop standard operating processes for responding or referring to EPA for specific questions. The Contractor shall also develop a resource guide that includes contact information for each state program, trade associations, materials exchanges, and other relevant

resources. The Contractor shall provide a copy of the general materials being distributed for all EPA Regions and both HQ locations. The Contractor shall update these materials on a monthly basis.

The phone line shall be available for leaving messages at any time, but open during regular business hours, with an ability to have call-back the same business day.

To help EPA manage the helpline, the Contractor shall generate monthly status reports about the inquiries, which include number, state of origin and type of calls and materials requested.

The initial volume for Information Line calls may be large during the period of time that projects begin. This task assumes the call volume will remain at fewer than 50 calls a week and email volume at fewer than 400 emails per week.

ERG shall notify EPA if the volume increases significantly, so that this task may be modified to reflect that.

In addition, the Contractor shall provide technical and engineering support to clean diesel projects by phone. Support may include providing information about technologies, assisting fleets with understanding how to assess a fleet, to assess the suitability of certain technologies for given applications, how to understand what constitutes a verified or certified technology, trouble-shooting during project implementation, and referring inquiries to EPA (Regions and HQ) when inquiries require EPA expertise or official government responses.

Tasks include:

1. Operate the Clean Diesel Helpline, including the menu system and standard operating procedures.
2. Develop standard responses in consultation with the WAM to frequently asked questions.
3. Check the voice mailbox and email box at least twice a day (morning and afternoon) for messages.
4. Respond with answers to standard questions within 1 business day and forward complex messages to the appropriate party immediately.
5. Respond with answers to requests for technical or programmatic support on specific projects within 1 business days. Follow up as necessary to resolve issues, and notify EPA if not resolved within 10 business days.

6. Log call and e-mail requests and responses in the NCDC database within 3 business days.

7. Update the outgoing message on helpline within 1 business day as necessary or when requested.

All updated, revised or newly created products will be reviewed and approved by the EPA WAM. Final electronic files shall be provided to EPA. The final products will be approved by the EPA.

7.0 REPORTING REQUIREMENTS

The Contractor shall prepare their Work Plan within 15 days of receipt of a Work Assignment signed by the Contracting Officer. The Work Assignment Manager (WAM), Project Officer (PO), and the Contracting Officer (CO) shall review the Work Plan. Official revisions, if necessary, shall be given to the Contracting Officer. The Contractor shall make revisions to their Work Plan, incorporating the Contracting Officer's comments, if necessary.

Final Report:

Due to the nature of the work being performed, at the end of the period, a summary shall be provided to the WAM compiling the number, type, and source of calls/email inquiries that were received and addressed by the Contractor through helpline phone and email boxes.

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the Contracting Officer on the Work Assignment. Any technical direction provided to the Contractor, if issued orally, must be confirmed in writing within 5 days of its issuance. Technical Direction shall be within the scope of the PWS and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75 percent of the funds and/or hours for this work have been expended.

 United States Environmental Protection Agency Washington, DC 20460		Work Assignment Number 0-0 1-12																																																																									
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Contract Number EPC-11-046	Contract Period Base	Option Period Number Title of Work Assignment Technical Background Paper to Support Global Green Freight Charter																																																																									
Contractor ERG		Specify Section and Paragraph of Contract SOW Tasks A, D, and E																																																																									
Purpose: <input checked="" type="checkbox"/> Work Assignment Initiation <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Periods of Performance From: Effective Date To: 8/31/2013																																																																									
Comments: This Work Assignment supports the development of a technical background paper for the Climate and Clean Air Coalition.																																																																											
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<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Li</th> <th style="width: 10%;">DC (Max 6)</th> <th style="width: 5%;">Bu dg (Max 4)</th> <th style="width: 10%;">Approp riation Code (Max 4)</th> <th style="width: 10%;">Budget Org/Code (Max 7)</th> <th style="width: 10%;">Program Element (Max 9)</th> <th style="width: 5%;">Object Class (Max 4)</th> <th style="width: 5%;">Am oun t (Max 4)</th> <th style="width: 5%;">D oll ars</th> <th style="width: 5%;">Cents</th> <th style="width: 10%;">Site/Project (Max 8)</th> <th style="width: 10%;">Cost Org/Code (Max 7)</th> </tr> </thead> <tbody> <tr><td>1</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>2</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>3</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>4</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>5</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>				Li	DC (Max 6)	Bu dg (Max 4)	Approp riation Code (Max 4)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Am oun t (Max 4)	D oll ars	Cents	Site/Project (Max 8)	Cost Org/Code (Max 7)	1												2												3												4												5											
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Work Assignment Manager Name: Joseph Annotti		Branch/Mail Code Phone Number 202-343-9744 Fax Number																																																																									
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Contracting Official Name Angela Lower _____ (Signature)		Branch/Mail Code CMD Phone Number 513-487-2036 Fax Number 513-487-2109																																																																									
Contractor Acknowledgement of Receipt and Approval of Workplan (Signature and Title)		Date																																																																									

EPA United States Environmental Protection Agency Washington, DC 20460 Work Assignment		Work Assignment Number 1-12 <input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:								
Contract Number EP-C-11-046		Contract Period 09/19/2011 To 08/31/2014 Base Option Period Number 1								
Contractor EASTERN RESEARCH GROUP, INC.		Title of Work Assignment/SF Site Name Technical Background Paper								
Specify Section and paragraph of Contract SOW Sections A, D, and E										
Purpose: <input checked="" type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 08/07/2013 To 08/31/2013								
Comments:										
<input type="checkbox"/> Superfund Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund										
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Work Assignment Manager Name Joseph Annotti							Branch/Mail Code:			
_____ (Signature)							_____ (Date)			
Project Officer Name Joie Middlebrook							Phone Number 202-343-9744			
_____ (Signature)							_____ (Date)			
Other Agency Official Name							FAX Number:			
_____ (Signature)							_____ (Date)			
Contracting Official Name Angela Lower							Branch/Mail Code:			
_____ (Signature)							_____ (Date)			
							Phone Number: 513-487-2036			
							FAX Number:			

EP-C-11-046, Work Assignment 1-12

PERFORMANCE WORK STATEMENT (PWS)

Title: Technical Background Paper to Support Global Green Freight Charter

Contractor and Contract Number: Eastern Research Group, Inc.
Contract EP-C-11-046

Work Assignment Number: 1-12

Period of Performance: Date of approval to August 31, 2013

Work Assignment Manager (WAM): Joseph Annotti
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Alternate WAM Buddy Polovick
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Project Officer (PO): Joie Middlebrook
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Fax: 734-214-4052
middlebrook.joie@epa.gov

Contracting Officer (CO): Angela Lower
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Cincinnati, OH 45268
Phone: 513-487-2036
Fax : 513-487-2109
lower.angela@epa.gov

I. BACKGROUND

The United Nations Environment Program (UNEP) created the Climate and Clean Air Coalition (CCAC) to address short lived climate forcers, including methane and black carbon (BC) emissions. A key initiative in this broad effort aims to achieve substantial reductions of fine particulate matter, black carbon emissions and greenhouse gas emissions from heavy duty diesel vehicles in the freight sector. It focuses on three areas: policy support in select countries on clean fuel and vehicle standards; a global initiative on financing to support refinery upgrades to produce low sulfur diesel fuel; and a green freight initiative to improve the energy and environmental efficiency of goods movement. Lead partners of this initiative are UNEP, USEPA, Environment Canada, the International Council for Clean Transportation (ICCT) and Clean Air Asia.

The primary activities under the green freight initiative are:

- 1) *Global Green Freight Declaration* signed by CEOs, Ministers and heads of key stakeholder organizations. This Declaration is a high level statement of principles, broad endorsement and commitment to develop a Global Green Freight Charter, with common goal of advancing the energy and environmental efficiency of goods movement globally to reduce the climate changing BC and greenhouse gas (GHG) emissions.
- 2) *Global Green Freight Charter* that will act as a green freight blueprint for countries and regions who are implementing green freight programs. The Charter will contain multiple elements, activities and commitments including: global, regional and national partnerships, finance mechanisms, technology verification, benchmarking and reporting tools, recognition, education and training, capacity building and a data sharing and best practices platform and clearinghouse.
- 3) *Design and Establish Green Freight Programs* in selected countries, and implementation of program elements, especially those that are relevant to BC reductions, such as driver training and education programs, truck inspection and maintenance programs, scrappage and/or retrofit projects and/or technology demonstration pilots, technology upgrade kits, and financing programs for technologies.

Green freight programs reduce BC emissions per distance traveled by improving the efficiency of vehicle operations, while reducing CO₂/GHG emissions and fuel expenditures, thus resulting in environmental/climate, health and economic benefits simultaneously. In addition, green freight programs can provide the framework needed to accelerate the adoption and penetration of cleaner fuels, particulate filters and other measures to reduce black carbon and other emissions from in-use trucks as included in the Heavy Duty Vehicles and Engines (HDVE) Initiative.

To support these primary activities, two key papers will be written to support the process, provide background and inform policy makers.

Briefing Paper - An executive-level paper will be made public with the Global Green Freight Declaration that will present a compelling case for green freight and the need for global coordination from governmental, social and business perspectives. The paper will outline the

objectives of and steps for the Green Freight Declaration and Charter and serve as a call to action for corporations, Ministries (and other key stakeholders) to agree to sign the Green Freight Declaration and therefore commit to the development of the Global Green Freight Charter. This paper will be written by the lead partners of the Green Freight Initiative.

Technical Background Paper - A substantive technical paper will be made public with the Global Green Freight Charter to support its development and implementation, while also serving as a key resource and reference as the Charter is implemented. The paper will survey and report on current global technologies and strategies for green freight and their potential to reduce BC, CO₂ and other emissions. The paper will also provide a detailed summary of current, ongoing and developing global green freight programs and provide details on the status of these efforts. The paper will inventory the technologies and strategies being used in US/Canada/Europe, Latin America, Asia and Pacific, Africa/Middle East; the degree of utilization; and the emissions, fuel and cost savings attributed to these efforts. The paper will also discuss lessons learned and opportunities to advance these programs to accelerate BC and GHG reductions and identify gaps and areas for improvement that are to be covered by the Charter. The paper will also include approaches to issues such as privacy as well as a discussion on metrics for quantification of benefits.

The purpose of this PWS is to develop the Technical Background Paper (described above) for the CCAC to use as the basis to support the Global Green Freight Charter. The intended purpose of the paper is to serve as a substantive foundational and reference document that will inform policy makers, business interests, and other stakeholders about the potential for efficiency gains, cost savings and emissions reductions in the global freight sector. Under this Work Assignment, the Contractor shall develop a paper that will be used by EPA and the steering committee as well as the signatories in the CCAC heavy duty vehicle program over the next several years. The paper shall have enough depth and content that it can be used as an independent resource and reference document for policy makers and researchers. The background research for this report will likely involve a combination of literature and web-based research, as well as interviews and personal communications with green freight representatives and experts from multiple regions and countries.

II. CONTRACT LEVEL STATEMENT OF WORK REFERENCE

The tasks to be performed under this Work Assignment are consistent with the work authorized in sections A, D, and E of the contract's Statement of Work.

III TASKS

Task 1: Prepare Work Plan (WP) Proposal

The Contractor shall submit a project Work Plan identifying how the Contractor plans to accomplish the tasks, by task and subtask. The WP shall include estimated costs and schedules. The Contractor shall identify available information and/or contact resources: contractual, industry, and academic.

Task 2: Develop Outline for Technical Background Paper

The Contractor shall prepare an outline for the paper based on the goals of the paper and the content needed to support those goals. This work includes summaries and elements as described below.

Contractor shall develop a detailed outline for the Technical Background Paper that shall be based on, but not exclusive to, the following elements:

- Reference to and background on the CCAC Green Freight Declaration and Charter
 - o Including elements of the briefing paper published with the Declaration.
- Summary information on the global impacts and implications of goods movement in terms of emissions (BC, GHG and other pollutants), fuel and energy use (by mode), costs, economic development, etc.
- Detailed survey of current global technologies and strategies and operating practices for green freight and their potential to reduce BC, CO₂ and other emissions.
 - o Emphasis shall be placed in the trucking and rail sectors (with supplemental information on the marine and air sectors)
 - o Graphics, pictures and images shall be used where possible to illustrate or catalogue available technologies and practices.
 - o The paper will report on the degree of utilization or penetration of these approaches by region or country.
 - o The paper will report on the current emissions, fuel and cost savings attributed to these efforts and the potential for additional savings with projections based on greater adoption rates.
 - o Discussion of any barriers or challenges to further implementation of these approaches.
- Detailed summary of current, ongoing and developing global green freight programs and provide details on the status of these efforts in the North America, Europe, Latin America, Asia and Pacific, Africa and Middle East.
- Inventory of existing programs, including size, scale, status, goals, program administrator, funding, participants, stakeholders, process, tools, metrics and methods used, etc.
- Insights and observations as reported on lessons learned and best practices in implementing these programs.
- Highlight challenges of harmonizing or aligning these programs in ways that maximize integration at the global level and enhance their utility for multinational efforts to improve freight efficiency and reduce BC and GHG emissions from freight.
- Recommendations on opportunities to advance these programs to accelerate BC and GHG reductions and identify gaps and areas for improvement that shall be covered by the Global Green Freight Charter.
 - o The report shall also be developed with the intent that it will be updated and amended by other parties in the future.

Deliverable(s)

2.1 – The Contractor shall submit the report outline in draft to the EPA WAM within four (4) weeks of receiving approval of the workplan.

2.2 – All deliverables for this task will be submitted to EPA via email in electronic files format, unless otherwise specified.

IV PROJECT REPORTING

Quality Assurance Project Plan (QAPP)

The Contractor shall provide a quality assurance project plan (QAPP) that describes the quality control processes used in support of Tasks 2 and 3. Guidance can be found at: QAPP for use of existing data: <http://www.epa.gov/quality/qs-docs/found-data-qapp-rqts.pdf>; Assessment Factors for relevance, applicability, utility of existing data: <http://www.epa.gov/spc/pdfs/assess2.pdf>; and EPA Requirements for QAPPs (Section B is not applicable in this project):

<http://www.epa.gov/quality/qs-docs/r5-final.pdf>. A draft QAPP is due within two weeks of WP approval; EPA will review the draft QAPP and provide comments back within two weeks of receipt of draft. The final QAPP is due within 10 business days of receipt of EPA comments.

V DELIVERY SCHEDULE AND MILESTONES

The Contractor shall complete deliverables in accordance with the schedule below.

<u>Task</u>	<u>Milestone/Deliverable</u>	<u>Date</u>
1	Work Plan/Cost Proposal	Within 30 days of receipt of WA
2	Draft outline of Technical Background Paper	Four (4) weeks from WP acceptance

VI DISTRIBUTION AND FORMAT OF DELIVERABLES

All deliverables, including status reports between the Contractor and the Government, shall be delivered in electronic format to the WAM and PO

Inspection and Acceptance Criteria

The WAM shall review deliverables for technical content, completeness, and grammar. Final inspection and acceptance of all reports, code, and other deliverables shall be performed by the WAM.

The Contractor may not accept technical direction from anyone other than the WAM, PO, or the Contracting Officer on the Work Assignment. Any technical direction or “guidance” provided to the Contractor, if issued orally, must be confirmed in writing within 2 days of its issuance. Technical Direction shall be within the scope of the SOW and the existing Contract Agreement under which it is written.

The Contractor shall notify the WAM when 75 percent of the funds and/or hours for this work have been expended.